

Team Management Systems
ACOWIN Texting Module Instructions
(Available in ACOWIN Version 5.30 or Later)

Revision 09.22.17

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Introduction

These instructions will guide you through setting up and using the texting module to send SMS text messages from ACOWIN to your customers. In order to send SMS Text Messages from your ACOWIN software, you will first need to setup a texting account with www.nexmo.com.

Setting up a Nexmo Account

In order to use the ACOWIN Texting module, you will need to setup an SMS account with Nexmo. To do this, go to www.nexmo.com and choose the option “Sign Up”. At the time of writing this documentation, it was at the top right hand side of the screen.




Fill out the information requested and click Sign Up

Create an account, grab your API key and test for free.

<input type="text" value="Name"/>	<input type="text" value="Tuttle"/>
<input type="text" value="TMS"/>	
<input type="text" value="youremail@youremail.com"/>	
<input type="text" value="+1"/>	<input type="text" value="2394378898"/>
<input type="text" value="....."/>	

By clicking on the Sign up button or otherwise using our services, you agree to be bound by the [Terms of Use](#) and [Privacy Policy](#).



After you sign up, you will receive a phone call or a text message with a verification code. Enter the verification code in the following screen. **NOTE – Be sure you use either a Cell Phone number or a number that does not go through an auto attendant to receive your verification code. If your phone system goes through an auto attendant, you will not receive your code.**

Phone number verification

We have sent you a PIN code in a text message or an automated phone call, please enter it below. If you didn't receive a code, you can [request a new one](#).

Phone Number: 12392252860

After you enter your verification number, you will receive an email to the email address you provided. Follow the instructions on the email to complete your registration.

Email address verification

Please verify the email address that you have provided for sign up in order for us to activate your account. We've sent you an email with instructions.

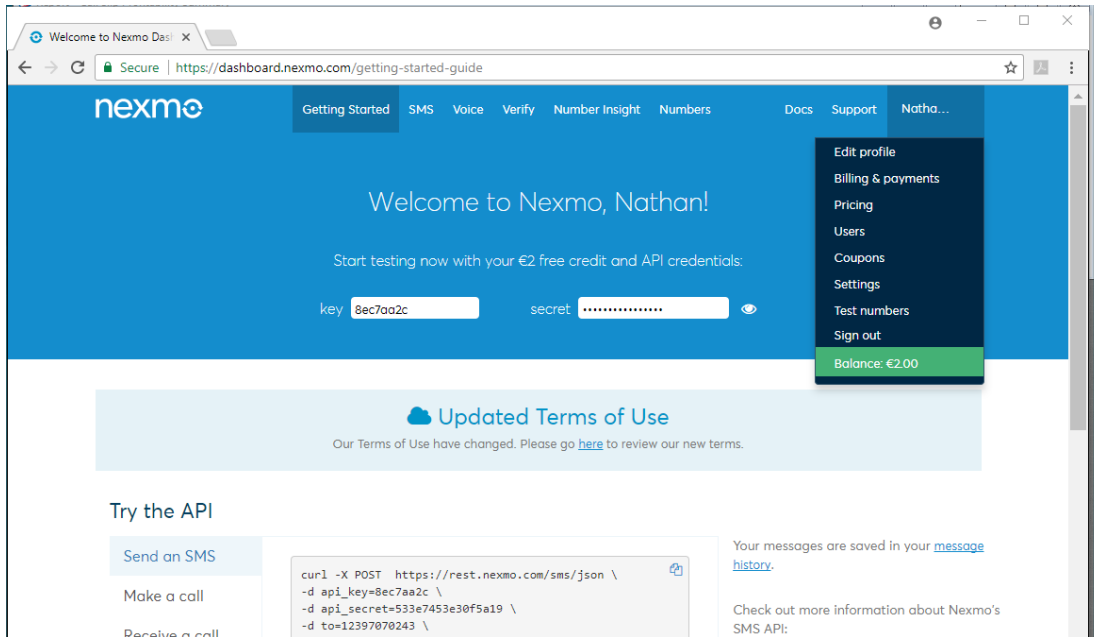
After your email address has been verified, you will need to login to Nexmo at www.nexmo.com, using your email address and password you provided when creating your account.

Login



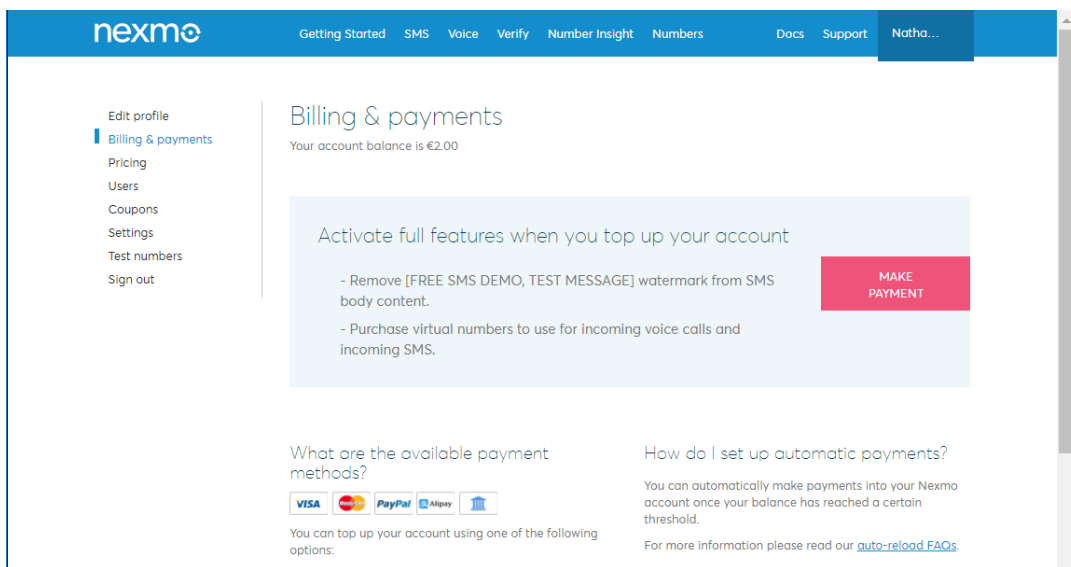
[Forgot your password?](#)

When you login, you will see a screen similar to the one below. Click on the name at the top right hand side of the screen and click on the “Balance” option in the menu drop down.

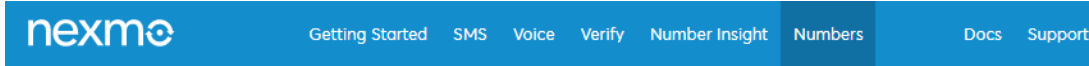


Click the “Make Payment” option and follow the screen prompts to finish setting up your account. ***You will need to make a payment before you will be able to purchase a toll free number. You must use a toll free number with the ACOWIN Texting module.***

Once you have made a payment, you will have an option to setup automatic payments. It is highly recommended that you setup automatic payments so that you do not have to manually go in and make payments. If you know that you are going to send out a “Blast” text, it is recommended that you check your balance prior to sending the blast and manually increase the balance if it is low. If you are setup for Automatic Payments, Nexmo checks the balance every 6 (six) minutes and will top off as needed.

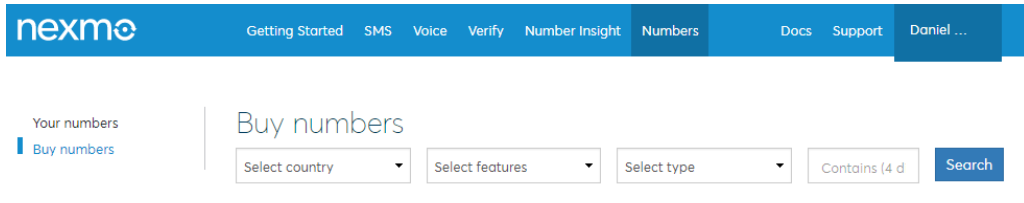


After you have made your first payment (and preferably setup Nexmo for automatic payments), you can purchase a toll free number. To purchase a toll free number, click the “Numbers” option at the top of the screen.

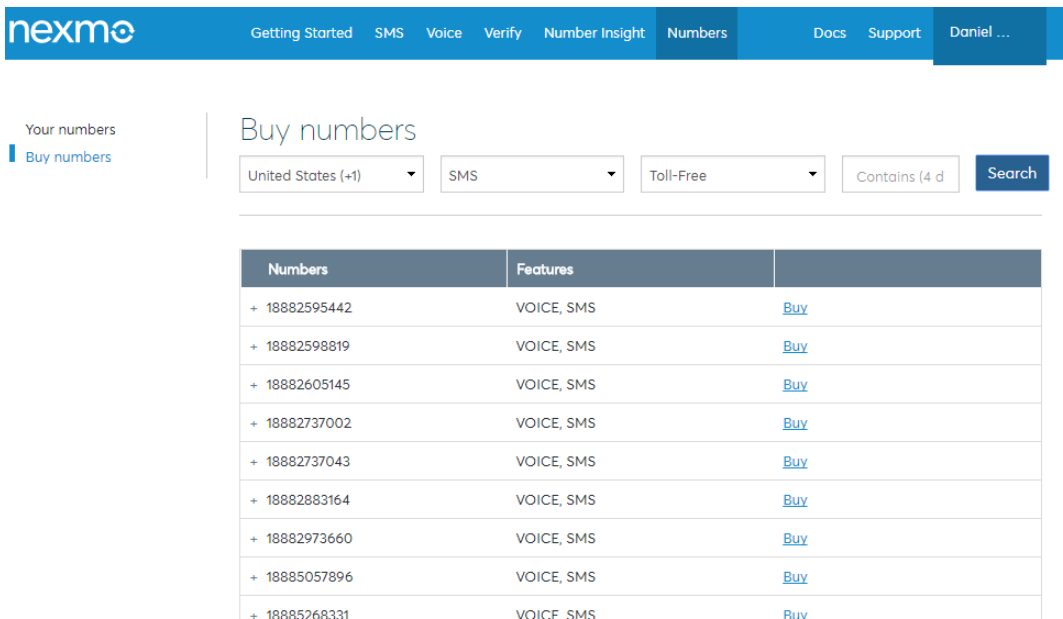


Choose the option “Buy Numbers” on the left hand side of the screen. Enter the following information in the following fields and click the Search Button:

Select Country United States
 Select Features SMS
 Select Type Toll-Free
 Contains Field is optional and can be left blank




Select a number from the list by clicking the “Buy” link to the right of the phone number that you would like to purchase. This phone number will be the number from which all of your texts to customers will come from.



Once you have purchased a Toll-Free number, it will appear in the “Your numbers” section. Click the “Your numbers” link at the left hand side of the screen to view your new Toll-Free number.

The screenshot shows the 'Your numbers' section of the Nexmo dashboard. At the top, there is a navigation bar with the Nexmo logo and links for Getting Started, SMS, Voice, Verify, Number Insight, Numbers, Docs, Support, and a user profile for Daniel. On the left, there is a sidebar with 'Your numbers' and 'Buy numbers' links. The main content area is titled 'Your numbers' and contains a search interface with three filters: 'Country' (Country name or code), 'Features' (All Features), and 'Contains' (e.g. 335678). A 'Search' button is located to the right of the search bar. Below the search bar is a table with the following data:

Country	Number	Next bill date
+ United States (+1)	1201 [redacted]	27 Sep 2017
+ United States (+1)	1888 [redacted]	16 Oct 2017

Write down the phone number and click on the “Getting Started” tab at the top of the screen. You will see a “key” and a “secret” field on the Getting Started tab. You will need this information to fill out the SMS Texting setup screen in TMS. To view the “secret” field, click the “eyeball” icon  to the right of the field and it will display the text. Write this information down, or cut and paste it into your TMS system. **NOTE** – If you are using MultiView for your screen emulator in TMS, you can paste by either right clicking in the field in which you would like to paste, or by clicking the “Edit” option at the top of the screen and choosing Paste from the drop down options.

The screenshot shows the 'Getting Started' page of the Nexmo dashboard. The page has a blue background and a white navigation bar at the top with the Nexmo logo and links for Getting Started, SMS, Voice, Verify, Number Insight, Numbers, Docs, Support, and a user profile for Daniel. The main content area is titled 'Welcome to Nexmo, Daniel!' and contains the text 'These are your API credentials:'. Below this text are two input fields: 'key' with the value 'e0f8a72e' and 'secret' with a masked value '.....'. An eyeball icon is located to the right of the secret field.

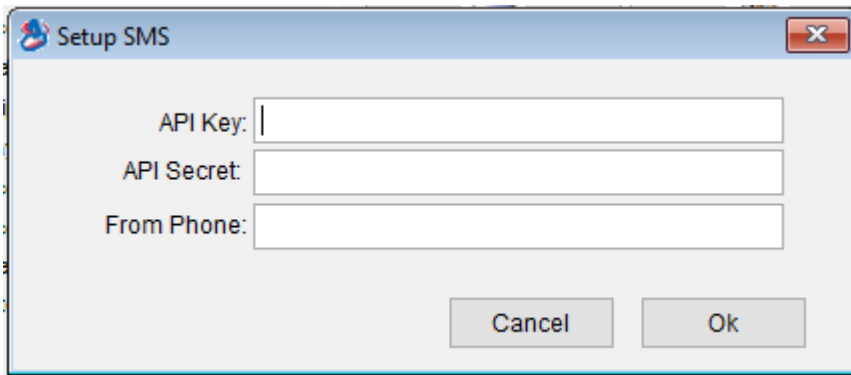
Configuring your ACOWIN system for SMS Texting

Click on the Company Information Setup icon on the Main menu and click the Setting Tab. In the Settings screen, click the Setup SMS button.



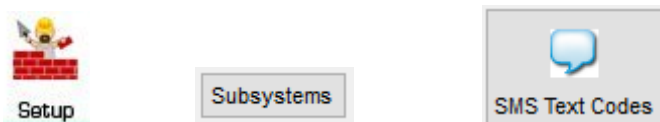
In this screen, enter the API Key, API Secret and the Toll-Free phone number that you purchased. Once you have entered this information, save the screen.

NOTE – Be sure to put a “1” in front of your Toll-Free number in the “From Phone ID” field.

A screenshot of a 'Setup SMS' dialog box. It has a title bar with a close button. Inside, there are three text input fields: 'API Key:', 'API Secret:', and 'From Phone:'. At the bottom right, there are two buttons: 'Cancel' and 'Ok'.

Setting up canned Text Messages

Click on the Company Information Setup icon on the Main menu and click the Subsystems Tab. In the Subsystem screen, click the SMS Text Codes button.



Code – This is a description that you will use to define the text message. This code will be used any time you want to send a canned text message.

Message – Enter the message that you want to text in this field. It is recommended that you start every text with the words “(No Reply)”, so that the customer is aware that they should not reply to the text. You can use any of the Merge Fields that appear next to the Description field in the message being sent and the system will substitute the Merge Field with data from the call slip.

NOTE - A text is charged based on the number of characters sent, in groups of 140 characters. So a text that contains from 1 – 140 characters will be charged as 1 text. If you have a text that contains more than 140 characters, but less than 280 characters, you will be charged for 2 texts, etc. Please note that the Merge Field can be longer than the code. For example, if you have a technician named Robert Jones and you use the “Tech” Merge Field, it is going to use 12 characters.

Merge Fields – The following Merge Fields can be used in the Message Text and they will be substituted with the appropriate information. Any of the Merge Fields can be used in any message, but some do not make sense to use in certain messages.

Sched Date – Scheduled Date of the call slip on the Dispatch Board

Sched Time – Scheduled time of the call. If you are using a Range of time, then the Range Time will be used, such as “11:00 AM to 1:00 PM. If you only have a Scheduled time and no range time, then just the scheduled time will be used.

Call Slip # - Call Slip number associated with the Call Slip.

Tech – Technician’s name

NOTE – Clicking on the Merge Field at the place you want to insert it in your message will automatically enter the Merge Field in the correct format in your document.

Using Texting in ACOWIN

Once you have setup your Account with Nexmo, entered your credentials and created some canned Text Messages, you are now ready to use the ACOWIN Texting Module in ACOWIN. There are 2 ways to text out of ACOWIN, of which, both start from the Dispatch Board. The first option is by clicking the SMS Texting Icon on the Dispatch Board and the second is by Right Clicking on a card on the Dispatch Board and clicking the SMS Texting Icon.

1. SMS Texting Icon from Dispatch Board – This option allows you to send messages based on different selection criteria, such as Technician, Date Range, Call Type(s) (Standard Call Slip, Inspection Call Slip or Job Cost Call Slip), Customer Type, Dispatch Status and Problem Code. This option would typically be used when you want to send a text reminding your customers about upcoming service calls, possibly the night before or the morning of the scheduled call. This option would also be used to send a reminder to all of your inspection customers that have an inspection that needs to be scheduled. You can also use this option to send your customers a thank you text after the calls have been completed.
2. SMS Texting Icon from Right Clicking a Call Slip on the Dispatch Board – Used to send single text messages to customer for a particular call. This option is typically used to inform a customer that a technician is on the way to their location, or a reminder that the customer has a call scheduled.

Entering Cell Number

Customer File

In order to text a customer, you will need to have their cell number in the customer site file, on the Site side of the screen. The “Cell” number field has always been there, so you may already have many of your customer’s cell phone numbers in your system.

<input type="checkbox"/> Inactive		Site	
Site ID	001422	-	0001
Type	RES		
Jacobs, Dan			
First / Last	Dan	Jacobs	
Comp. Name			
Address 1	4524 Pinehurst Greens Ct		
Address 2			
City, ST, Zip	Ft. Myers	FL	33913-
Contact	Danny		
Cont. Title			
Phone / Fax	(239) 555-6630	(239)	-
Cell / Alt Phone	(239) 707-0243	(239) 708-4321	
Website			
E-Mail			
<input type="checkbox"/> Use Company Name		<input type="checkbox"/> Foreign Address	

NOTE – If the customer does not want you to text them, enter “9999” in the “Extension” field next to the Cell Number and the system will not select that customer when sending mass texts.

Call Slip File

The “Cell Number” field has been added to the Call Slip screen. If you already have a cell number in the Customer File, it will carry over to this screen automatically. If you do not have a Cell Number in the Customer File, it will automatically fill in the primary number in the Cell Number field when you add a new call slip. Since in today’s day and age most customers give you their cell number as the primary, ACOWIN elected to carry over the primary number to the cell number field on the call slips if it was blank. Be sure to verify the cell number with your customer when taking a service call. If the customer requests that you do not text them, enter “9999” in the Extension field next to the Cell Number and the system will not text them.

NOTE – If you change the cell phone number on the call slip, it will automatically update the cell phone number in the customer file. However, changing the cell phone number in the customer file *will not* update the cell phone number in *previously* created call slips. It will use the new phone number the next time a call slip is created.

Call Slip

Site: 001422-0001
 Name: Jacobs, Dan
 Address: 4524 Pinehurst Greens Ct
 Ft. Myers, FL 33913

Bill To: 001422
 Name: Jacobs, Dan
 Contact: Danny
 Phone: (239) 555-6630
 Cell: (239) 707-0243

Contract: [Field]

Problem Codes

Code	Problem Name	Est Time Req
NC	(Site Notes) No Cooling	01:30

Total Est Insp/Prob Time: 01:30
 Adjusted Est Time: 01:30

Description: *** NC-No Cooling ***
 System is not blowing any air and thermostat is blank.

Site Notes: [Empty Field]

Call Slip: 3041 10/14/2017 08:58a
 Type: Call
 Status: SCHED Recent: 0 in 2 mth

Zone: Gateway
 Priority: DEFLT
 Tech: NATE

Sched: 10/14/2017 12:00p
 Range: / /


Current	0.00
1 - 30	0.00
31 - 60	0.00
61 - 90	0.00
> 90	0.00
Total	0.00

Next inspection in September 2017

Sending a Text

Texting a Single Call Slip

When you want to text a customer from the Dispatch Board, simply Right Click the call

slip to which you want to send a text and press the SMS Text Icon.  This will popup a small screen for you to select a Preset Text Code. Select the code for the message you want to send and click the Send Key. Once you have sent the text, a message box will appear indicating if the text was sent, and the remaining balance in your Texting Account. It will also display the date and time that the last message was sent above the SMS Text Icon on the screen. **NOTE** – If you try to send a call to an invalid phone number, you will receive a message indicating that the system was unable to send a text to the cell number provided.

Send SMS

Call Slip #: 3041
 Site: Jacobs, Dan

Presets: SCHED INSP
 SERVICE CALL

Send

Send SMS

Call Slip #: 3041
 Site: Jacobs, Dan

Presets: SERVICE CALL

Send

Acowin

Send Completed
 Remaining Balance: \$4.40

OK

Acowin

Unable to send text to this phone number

OK

Dispatch Record Detail

Callslip Number	3041	Site Number	001422-0001	Tablet	<input type="checkbox"/>
Site Name	Jacobs, Dan	Zone	Gateway	Needs Attention	<input type="checkbox"/>
Site Address 1	4524 Pinehurst Greens Ct	Priority	DEFLLI	Reschedule Call	<input type="checkbox"/>
Site Address 2		Tech	NATE	GPS Data	<input type="checkbox"/>
City, ST, Zip	Ft. Myers, FL 33913	Type	Tech 1	Dispatched Status	Open
Site Phone 1	(239) 555-6630	Tech Status, Dept	HVA	Paged Status	
Ctc Phone		Est. Time	01:30 hh:mm	Call Taken	10/14/2017
Contact	Danny			Credit Status	
Email		Cell: (239)707-0243		Last Text	Sat, Oct 14 @ 09:12a

Scheduled	10/14/2017	12:00p		
Range	/ /			
Dispatched	10/14/2017			
Arrived	10/14/2017			
Departed	10/14/2017			

Problem Codes

NC	01:30
----	-------

Description

*** NC-No Cooling ***
System is not blowing any air and thermostat is blank.


Site Notes

Multi Tech Schedule
Call Slip Notes

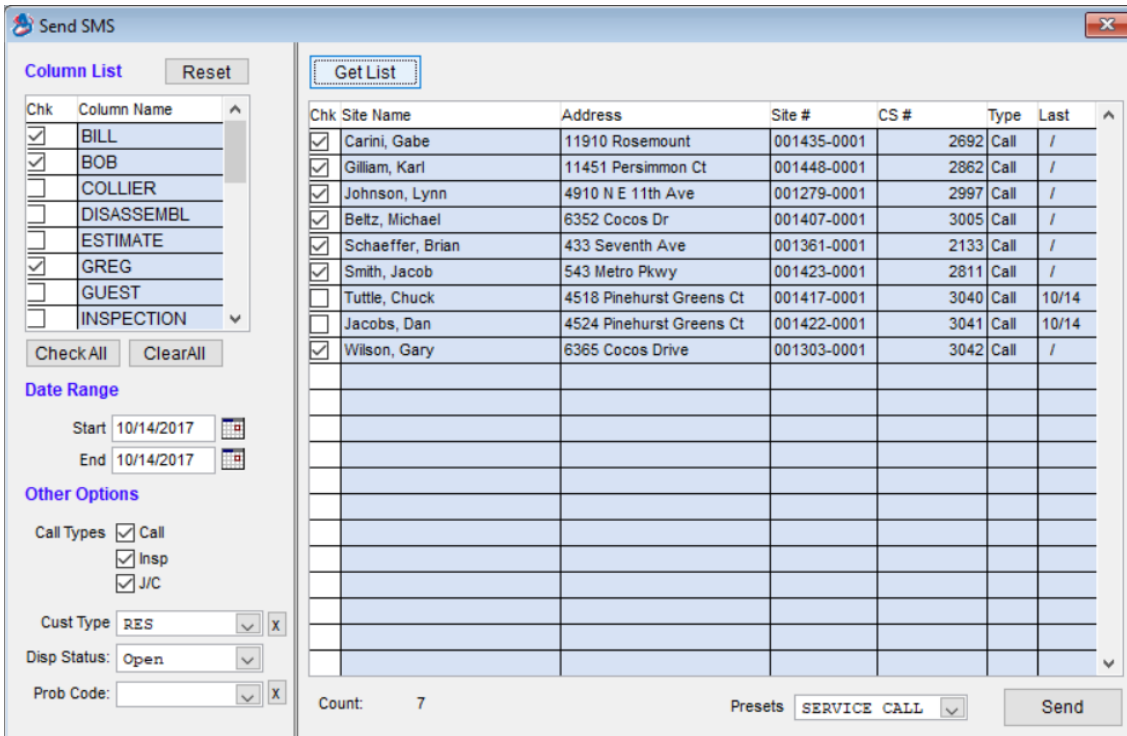
Contract List

Texting Multiple Calls at one Time

When you want to text to multiple calls at one time, such as all calls for a particular technician, a particular date, for a particular problem code, etc., click the SMS Text Icon

on the left hand side of the Dispatch Board.  This will open up the Mass Send SMS screen. In this screen, enter the selection criteria you want, and click the “Get List” button at the top of the screen. This will give you a list of all the calls that meet the selection criteria entered. NOTE – If you have already texted a customer for the current date, they will appear in the list, but they will not have a check mark in the first column, indicating that you want to text them. If they have already been texted on the current date, you will have to manually enter a check mark for them to get an additional text. This eliminates accidentally sending the customer multiple texts in a day. However, if you mass text a reminder to the customer the day before and want to send another reminder text the day of the service, since the last time you sent a text was the prior day, all calls that have not been texted on current date will be checked.

NOTE – Only customers that have a “Cell Number” in the call slip file will show up in the list. If the customer has a “Cell Number”, but an “Extension” of 9999, they will not show up in the list.



When you have made the appropriate selections, click the Send button to send the text to your selection. If the text was successful, the call in the CS # column will turn green, indicating that the text was successful. If the number was not a mobile number, the message will not be texted and the call in the CS # column will turn red. If the CS # remains blue, it indicates that the line was not checked to receive a text.

If a phone number has already been verified as not being a mobile number, the Site Number will appear in yellow when you bring up your list of calls. Even if you place a check mark to send a text, the system will not attempt to send a text since it is not Mobile Number and the CS# will turn red if you did attempt to send a text.

NOTE – After the system has verified if a phone number is or is not a mobile number, it will store the information in the system so that you are not charged to verify the number on subsequent send requests.

Send SMS

Column List

Chk	Column Name
<input checked="" type="checkbox"/>	BILL
<input checked="" type="checkbox"/>	BOB
<input type="checkbox"/>	COLLIER
<input type="checkbox"/>	DISASSEMBL
<input type="checkbox"/>	ESTIMATE
<input checked="" type="checkbox"/>	GREG
<input type="checkbox"/>	GUEST
<input type="checkbox"/>	INSPECTION

Date Range

Start: 10/14/2017

End: 10/14/2017

Other Options

Call Types: Call
 Insp
 J/C

Cust Type: RES

Disp Status: Open

Prob Code:

Chk	Site Name	Address	Site #	CS #	Type	Last
<input checked="" type="checkbox"/>	Carini, Gabe	11910 Rosemount	001435-0001	2692	Call	/
<input checked="" type="checkbox"/>	Gilliam, Karl	11451 Persimmon Ct	001448-0001	2862	Call	/
<input checked="" type="checkbox"/>	Johnson, Lynn	4910 N E 11th Ave	001279-0001	2997	Call	/
<input checked="" type="checkbox"/>	Beltz, Michael	6352 Cocos Dr	001407-0001	3005	Call	/
<input type="checkbox"/>	Schaeffer, Brian	433 Seventh Ave	001361-0001	2133	Call	/
<input checked="" type="checkbox"/>	Smith, Jacob	543 Metro Pkwy	001423-0001	2811	Call	/
<input type="checkbox"/>	Tuttle, Chuck	4518 Pinehurst Greens Ct	001417-0001	3040	Call	10/14
<input type="checkbox"/>	Jacobs, Dan	4524 Pinehurst Greens Ct	001422-0001	3041	Call	10/14
<input checked="" type="checkbox"/>	Wilson, Gary	6365 Cocos Drive	001303-0001	3042	Call	/

Count: 7 Send Completed Presets: SERVICE CALL

Chk	Site Name	Address	Site #	CS #	Type	Last
<input type="checkbox"/>	Carini, Gabe	11910 Rosemount	001435-0001	2692	Call	10/14
<input type="checkbox"/>	Gilliam, Karl	11451 Persimmon Ct	001448-0001	2862	Call	10/14
<input type="checkbox"/>	Johnson, Lynn	4910 N E 11th Ave	001279-0001	2997	Call	10/14
<input type="checkbox"/>	Beltz, Michael	6352 Cocos Dr	001407-0001	3005	Call	10/14
<input type="checkbox"/>	Smith, Jacob	543 Metro Pkwy	001423-0001	2811	Call	10/14
<input type="checkbox"/>	Tuttle, Chuck	4518 Pinehurst Greens Ct	001417-0001	3040	Call	10/14
<input type="checkbox"/>	Jacobs, Dan	4524 Pinehurst Greens Ct	001422-0001	3041	Call	10/14
<input type="checkbox"/>	Wilson, Gary	6365 Cocos Drive	001303-0001	3042	Call	10/14
<input type="checkbox"/>	Schaeffer, Brian	433 Seventh Ave	001361-0001	2133	Call	/

Inspection Call Slips

If you assign unscheduled inspection call slips to a particular column on the dispatch board, such as an “Inspection” column, you can easily send a text to your customers to remind them to schedule their inspections. Simply choose the column in which your “Unassigned” inspection call slips are located and choose the “Call Type” of Insp for the appropriate date. This will select all of your “unscheduled” inspection call slips and you can send a text encouraging them to call the office to schedule their inspection.

A sample text message to send to customers to schedule their inspection might look something like this:

(No Reply) From Team Service Company: It is time to schedule your system tune up. Please call our office at (239) 437-8898 and reference work order # [CallSlipNo].

The [CallSlipNo] merge field will be replaced with the actual call slip number, making it easy for the CSR to find the call and schedule it when the customer calls to schedule.

Chk	Site Name	Address	Site #	CS #	Type	Last
<input checked="" type="checkbox"/>	Jacobs, Dan	4524 Pinehurst Greens Ct	001422-0001	2809	Insp	/
<input checked="" type="checkbox"/>	Detmer, Jane	5772 Inverness Circle	001440-0001	2873	Insp	/
<input checked="" type="checkbox"/>	Kelly, Megyn	1223 Fox Way	001396-0001	2954	Insp	/
<input checked="" type="checkbox"/>	Wells, Lloyd	6352 Cocos Drive	001333-0001	3010	Insp	/
<input checked="" type="checkbox"/>	High, Andy	17643 Marco Island Lane	001288-0001	3030	Insp	08/22
<input checked="" type="checkbox"/>	Perry, Phil	11481 Persimmon Ct	001129-0001	3031	Insp	08/22

NOTE – Only customers that have a “Cell Number” in the call slip file will show up in the list. If the customer has a “Cell Number”, but an “Extension” of 9999, they will not show up in the list.

If you would like to send your service agreement customers a text after you have performed their inspection, such as to thank them for being a service agreement customer, or to give them a special offer, etc., choose all technicians, choose only the Call Type of “Insp” and select the Dispatch Status of “Closed” or “Posted” for the particular date or dates. Select an appropriate “Preset” code and click the Send button. This will send a message to any customers with a Cell number that meets the criteria.