

SMS Texting in Storage Commander

Storage Commander now includes the ability to send Text Message directly to a customer's phone. Messages can be automatically sent when a customer becomes past due or custom message can be send at any time to one or more customers.

This new features is available in version 5.9.0.0 or later. For additional help with any part of the texting process please contract our Technical Support department at support@storagecommander.com, www.storagecommander.com or by calling 951-301-1187.

Setting up your Twilio Account

[Twilio](https://www.twilio.com) (Pronounced TWILL-e-o) is a cloud based communications company that provides texting and phone services for software programs like Storage Commander. Before you can use the Texting feature in Storage Commander, you must setup an account with Twilio and provide the account numbers to Storage Commander so it can send the messages using your Twilio account.

Start by navigating to the Twilio login page, <https://www.twilio.com/login>, and select "Sign up for free".

A screenshot of the Twilio sign-up form. The form is titled "It's fast and free to get started." and contains several input fields and dropdown menus. The fields include "First Name", "Last Name", "Company Name (optional)", "Email", "Choose a password", and "Password, again". There are three dropdown menus labeled "What are you building?", "Choose your language", and "Which product do you plan to use first?". At the bottom, there is a red "Get Started" button and a link for "Already have an account? Login".

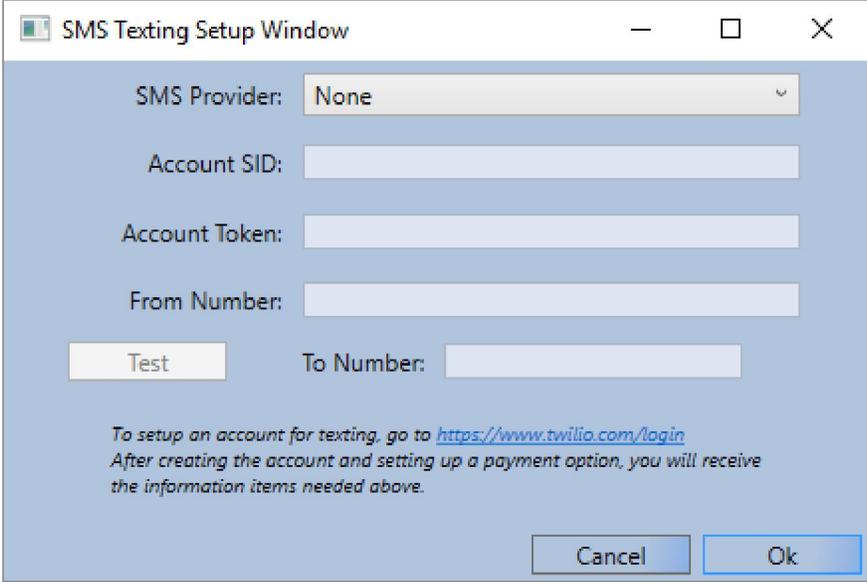
Once you have successfully created your account and setup a payment option, you will be presented with your API Credentials. These values are the keys needed by Storage Commander to send message using your account. You can return to this page after logging in and clicking the Account / Account Settings menu on the Twilio web site.

You will need three values from you Twilio account:

1. AccountSID. This is your primary account number.
2. **AuthToken**. Used to authorize / verify the software connecting (like a password).

3. **From Number**. The phone number assigned to you by Twilio used only for texting. Your customers will see this number as the sending number of the text. You cannot use your own phone number.
4. Enter these values in Storage Commander's Configuration Manager, in the Facility setup screen.

In the Configuration Manager, go to the Facility button and double-click on your facility name. Select the "Texting Setup...." Button to open the texting setting screen.



SMS Texting Setup Window

SMS Provider: None

Account SID:

Account Token:

From Number:

Test To Number:

To setup an account for texting, go to <https://www.twilio.com/login>. After creating the account and setting up a payment option, you will receive the information items needed above.

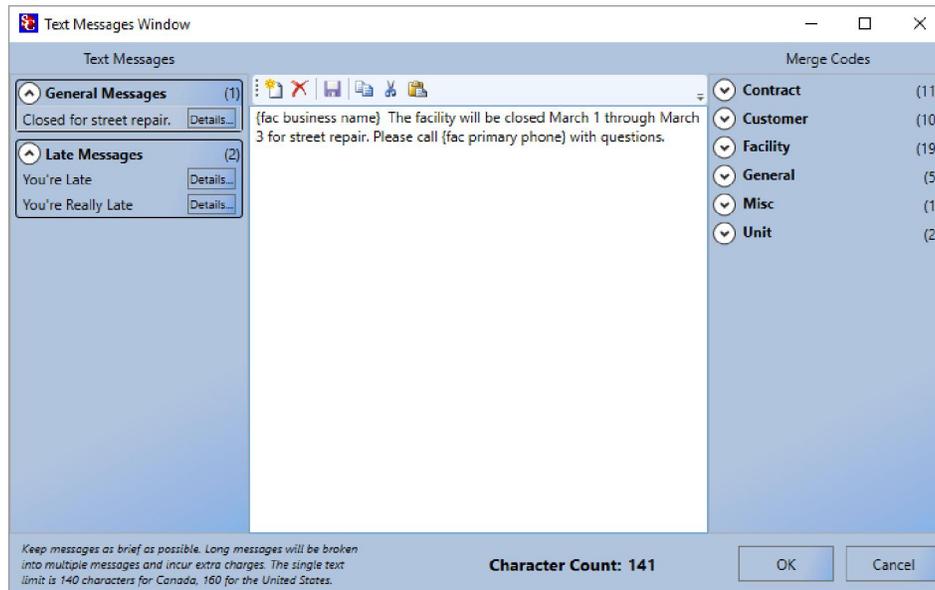
Cancel Ok

Select "Twilio" as the SMS Provider. Enter the Account SID, Account Token, and From Number (Copy and paste from the Twilio screens is easiest.)

Once you have the information entered, test your account using the Test button. Enter a phone number of yours that can receive text messages. Be sure to have the "+1" in front of your full number, including the area code (example, 1-123-456-7890). Once you have successfully tested your account information click "OK" to save your changes.

Creating Text Messages to send to your customers.

Open the Text Messages screen from the Company Setup section of the Configuration Manager.



Click the “New”  button on the toolbar to create a new Text Message. Insert Merge codes from the list on the right to automatically embed customer and facility information in each message. Keep in mind that these message should be brief and limited to 160 characters or less. Long message will be broken into multiple text message and incur additional cost. Once the message is complete, click the “Save”  button to save your changes. Use the Category and Name fields to help sort and select your messages.

Enabling automatic Text Messaging in the late processes.

Each late step with the late process can be setup to include a Text Message just like sending letters or emails to customers in order to notify them about past due accounts. You can create late steps that only send a Text Messages or include a Text Message in existing late steps.

The screenshot shows the 'Late Step Details' window for a 'V4 Late Group'. The 'Late Step Name' is '10-Day Late Letter'. The 'Days Late' is set to 11, and 'Days Between' is 0. The 'Status' is 'Late' with '(V4 Compatibility)' noted. Under 'Options', 'Deny Gate Access' is checked, while 'Overlock', 'Qualifies For Auction', 'Return After Partial Payments', 'Late Fees Apply Each Period', and 'Don't Print If Emailed' are unchecked. The 'Fees To Charge' section is empty. The 'Notices' section has a table with columns 'Create' and 'Document Name':

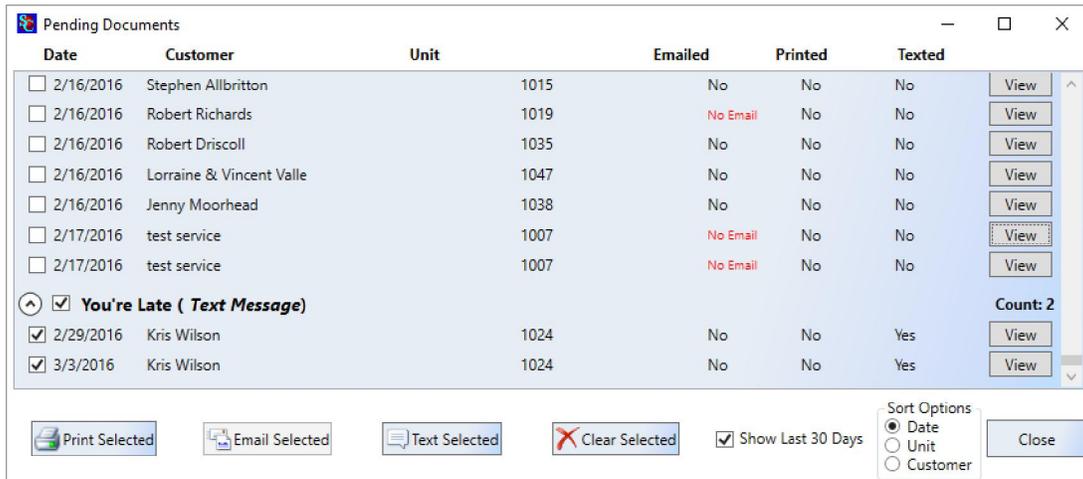
	Create	Document Name
Customer	<input checked="" type="checkbox"/>	Late Notice
Alternate	<input type="checkbox"/>	
Customer Recurring	<input type="checkbox"/>	
Alternate Recurring	<input type="checkbox"/>	
Send Text Message	<input checked="" type="checkbox"/>	You're Late

Buttons for 'Add' and 'Delete' are at the bottom right of the 'Fees To Charge' section, and 'OK' and 'Cancel' are at the bottom of the window.

Simply check the box next to "Send Text Message" and select one of the existing message you previously created. The personalized Text Message will be created for each qualifying customer and place in the Pending Documents screen just like late and lien notices during the End-Of-Day process.

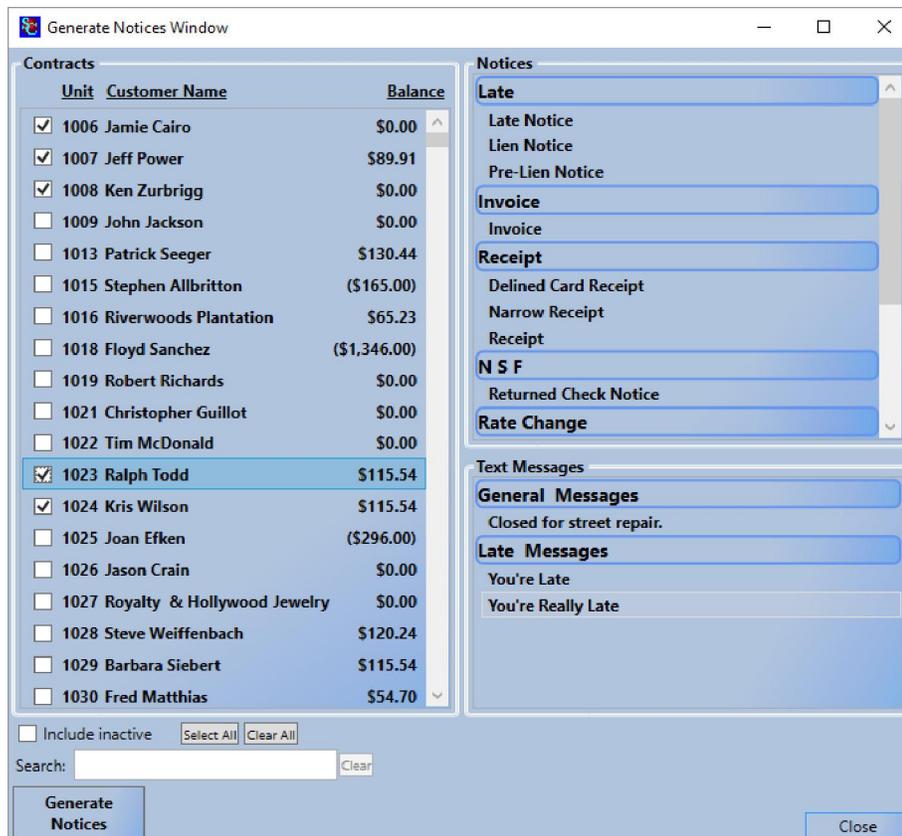
Sending Text Messages create during End-Of-Day.

Display the Pending Documents screen from the View menu, or by clicking the button on the toolbar in the Storage Commander program. In the Pending Documents screen, select the message(s) you want to send and click the “Text Selected” button.

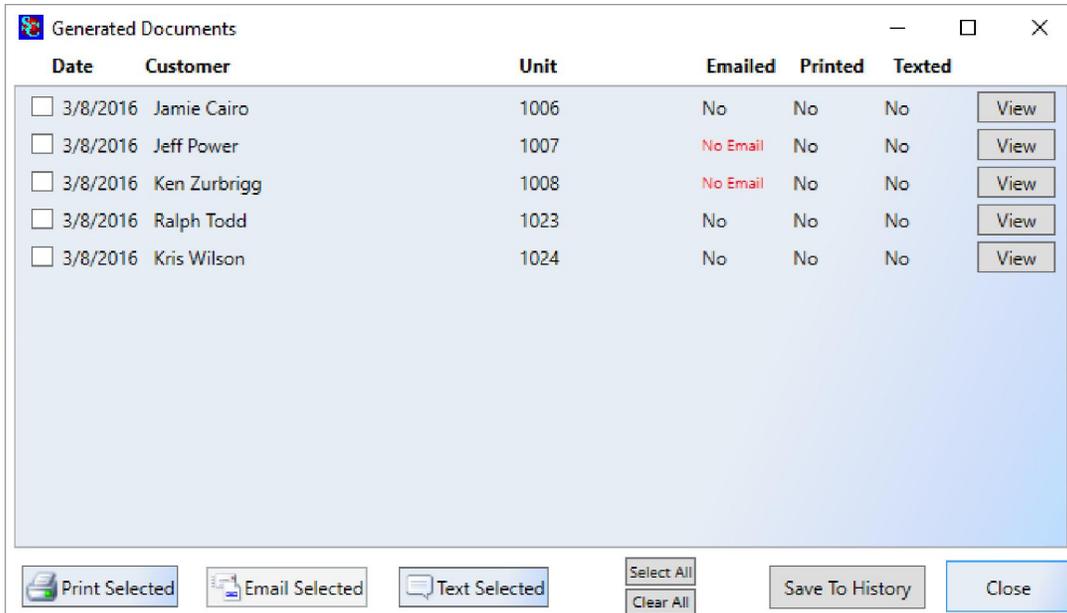


Sending Text Messages to multiple customers.

Display the Generate Documents screen from the Activities menu in Storage Commander.



Select the customer(s) that you would like to send message to on the left side of the screen. Then select from the Text Messages display at the bottom-right of the screen. Once you have the selections the way you want them, click the “Generate Documents” button. Once the documents are created the Generated Documents window will automatically be displayed.



Select each customer from the list and click the “Text Selected” button at the bottom of the screen to send the text message. If you would like to append the text message to the customers history by clicking on the “Save to History” button.

To view a sample of one of the messages, click the “View” button at the right of one of the customer’s information.

[Sending Text Messages to individual customers.](#)

Throughout the Storage Commander program you can right-click on customer’s account in one of the main screen lists and select “Send Text Message”. This will display a small window allowing you to quickly select a message and send it immediately to that customer’s phone. Please note, the Send Text Message menu item may be gray-out and not available if the customer does not have a text abled phone number setup.

Enabling Phone Numbers to Receive Text Messages.

In order to send a customer a Text Message, the customer must have a phone number that has been enabled for texting.

The screenshot shows a software interface for 'Contract Details - Power, Jeff'. The window title is 'Contract Details - Power, Jeff' and the unit is 'Unit: 1007'. The customer name is 'Jeff Power'. The interface includes a sidebar with navigation options: Contract, Unit Info, Customer, Alternate Contacts, Photos, Fingerprints, Authorized Access, Employer, Notes/Comments, Ledger/History, and Activities. The main area contains fields for personal information: First Name (Jeff), Middle, Last Name (Power), Business Name, Web Site (www.storagecommander.com), Tax Id, Tax Exempt, Is Military, Military Status (None), Branch, Email, Birthday (3/8/2016), Driver License/ID, DL State, Exp Date (3/8/2016), and SSN. Below this is the 'Addresses' section with a primary address: 41695 Date Street, Suite A, MURRIETA, CA 92562, USA. The 'Phones' section is circled in red and contains one entry: 'Personal cell phone (Cell)' with the number '(951) 672-6257', description 'Personal cell phone', and type 'Cell'. The 'Can Receive Text' checkbox is checked. Navigation buttons 'Previous', 'Next', and 'Finish' are at the bottom.

In the Contract Details screen, or in the Move-In screens, check the “Can Receive Text” checkbox next to the customer’s phone number that you want to use for texting. Enabling and disable numbers provides you a way to keep a phone from receiving a Text Message if that customer request not to receive message on a particular phone.

Please note, only one of the customer’s phones will be selected when creating a text message starting with the Cell number, then Primary, and then other types for phones.