

Twilio Texting

The Twilio Number Setup window requires information that must be obtained from NASA before you proceed.

Twilio can only be setup by an Eclipse System Administrator.

The setup is only required one time for the agency.

The setup is not agency specific and will only be needed in the main agency in a multi-agency setup.

Each texting number added after the initial setup must be entered in the Twilio Phone Number Setup screen before the user may use the service. This list will provide all unique logins from all agencies in the Eclipse database to attach to each phone number.

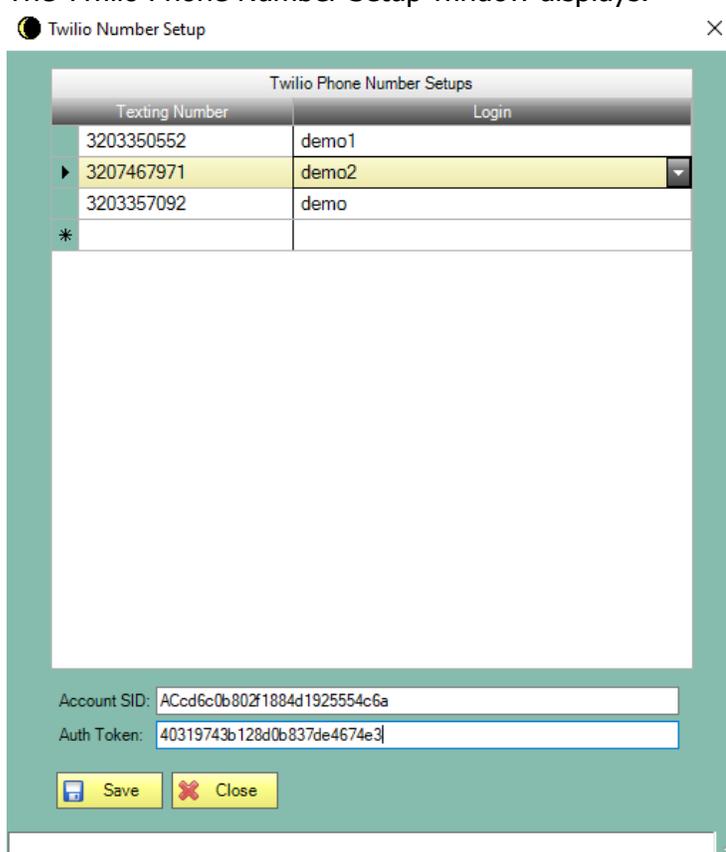
Any users not using the Twilio texting service will still be able to send texts using the old texting method.

Mass texting and emoji's are not available with Twilio.

To Setup Twilio

On the Menu Bar, click Setup and Twilio Setup.

- The Twilio Phone Number Setup window displays.



The screenshot shows a window titled "Twilio Number Setup" with a close button (X) in the top right corner. The main content area is titled "Twilio Phone Number Setups" and contains a table with two columns: "Texting Number" and "Login". The table has three rows of data, with the second row highlighted in yellow. Below the table is a large empty text area. At the bottom of the window, there are two input fields: "Account SID:" with the value "ACod6c0b802f1884d1925554c6a" and "Auth Token:" with the value "40319743b128d0b837de4674e3". At the very bottom, there are two buttons: "Save" and "Close".

Texting Number	Login
3203350552	demo1
3207467971	demo2
3203357092	demo
*	

Account SID: ACod6c0b802f1884d1925554c6a
Auth Token: 40319743b128d0b837de4674e3

Save Close

- Each Login using the Twilio texting service within Eclipse must be assigned a phone number from Twilio, and setup in Eclipse.
- Account SID and Auth Token are created for the agency when the Twilio service is signed up for. This number is the same for every login in Eclipse and is only setup once.

Once the necessary setup has been completed, click Save and Close.

To Setup Customer Cell Numbers or “Text Opt-Out”

Cell numbers must be set at the customer level to be used with Twilio texting.

When the Phone Type of ‘Cell’ is selected on a phone number, that number becomes available for texting.

If a cell number has a checkmark in ‘Text Opt-Out’ that number will not be available for texting.

If a cell number has text conversation history, that cell number cannot be marked for ‘Text Opt-Out’ or deleted until all the text messages on that number have been documented or deleted.

If an Eclipse user does not have a Twilio number assigned to their login or if they do not have permission to access other users Twilio text messages, they cannot themselves document any text message conversations from Twilio.

	Phone Number	Ext	Phone Type	Carrier	Text Opt-Out	Use	Description
...	111-111-9999		Cell		<input type="checkbox"/>	Home	Mike's Cell
...	111-555-1111		Cell		<input checked="" type="checkbox"/>	Alternate	Mary's Cell
▶	111-222-0000		Phone		<input type="checkbox"/>	Home	

To Setup User Preferences

On the Menu Bar, click Setup and User Preferences.

- The User Preferences window displays.
- Under Texting Options, verify the settings for the following:

Texting Access Options

Select the access that they want the other Twilio users in the office to have to their own Twilio number. *This will not apply to Non-Twilio users.*

No Access by Others – Other Twilio users in the office will not have access to see the current user texts.

View Only by Others – Other Twilio users in the office will be able to view the current user texts, but will not have any other access to their texts.

View or Send by Others – Other Twilio users in the office will be able to view and send from the current users Twilio number. They will also have access to Document text messages.

View, Send or Delete by Others – Other Twilio users in the office will have access to View, Send, or Delete the current user text messages. *This option is the default per user.*

Texting Options	
Texting Access Options	View Only by Others
Texting Signature	This is Jane Doe from North American Software Associates. This is a text only
	No Access by Others N
	View Only by Others V
	View or Send by Others S
	View, Send, or Delete by Others D

Texting Signature

- The Texting Signature should be entered in the available blank box.
- This is used when sending out texts from Eclipse so the recipient knows who you are. *This field is limited to 150 characters.*
- The signature must be selected on each text that you want it included on, it will not default.

Texting Options	
Texting Access Options	View Only by Others
Texting Signature	This is Jane Doe from North American Software Associates. This is a text only phone number.

Text Message Conversation Window

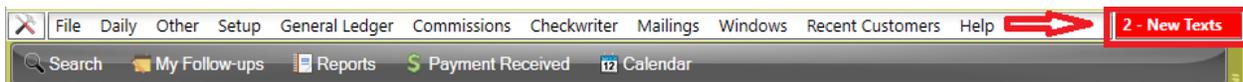
- Select a Y in the "Show only Undocumented Text Conversations" if you only want to view text messages that have not been documented in Eclipse or deleted from the Text Message Conversation window. Any text messages that have been documented in Eclipse can be viewed from the Doc List. If a text message is deleted without being documented that message is permanently gone.

Texting Options	
Texting Access Options	View, Send, or Delete by Others
Texting Signature	This is Jane Doe with NASA. My office hours are Monday through Friday 8 AM - 5 PM. This is a text only phone n
Show Only Undocumented Text Conver	N

Texting Notification and Conversations



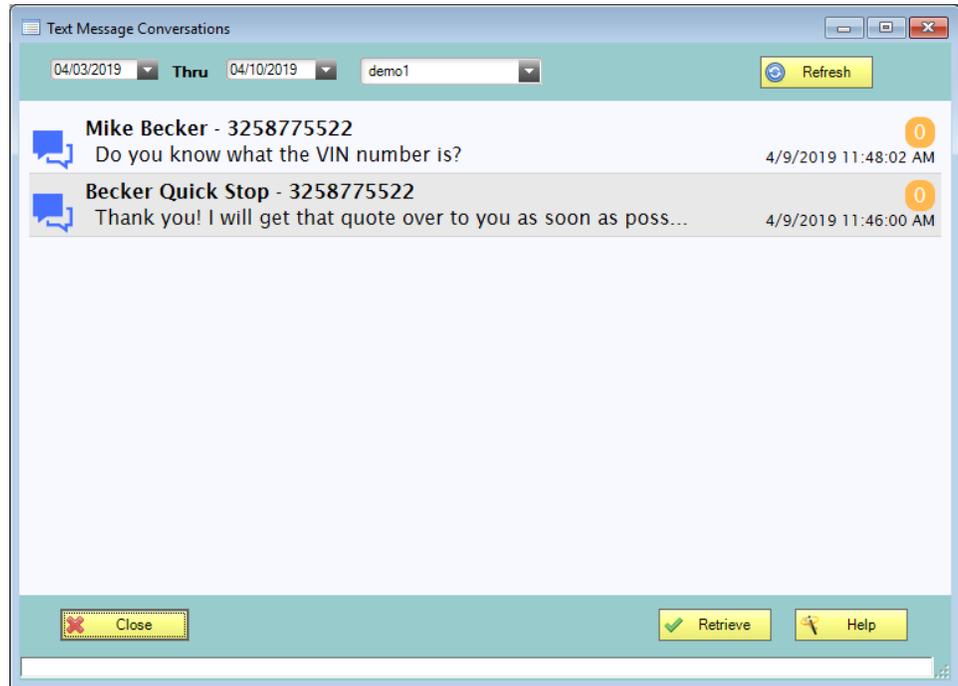
Once the setup has been completed and Eclipse is restarted, a grey notification box will appear on the Title Bar.



When new text messages arrive, the box will turn red and a number will indicate how many **new** text messages there are for the text number associated with the specific users' login.

Click on the 'New Texts' box to open the Text Message Conversations window which displays a list of all text conversations from the last **7 days** for the Twilio text number associated with a specific login.

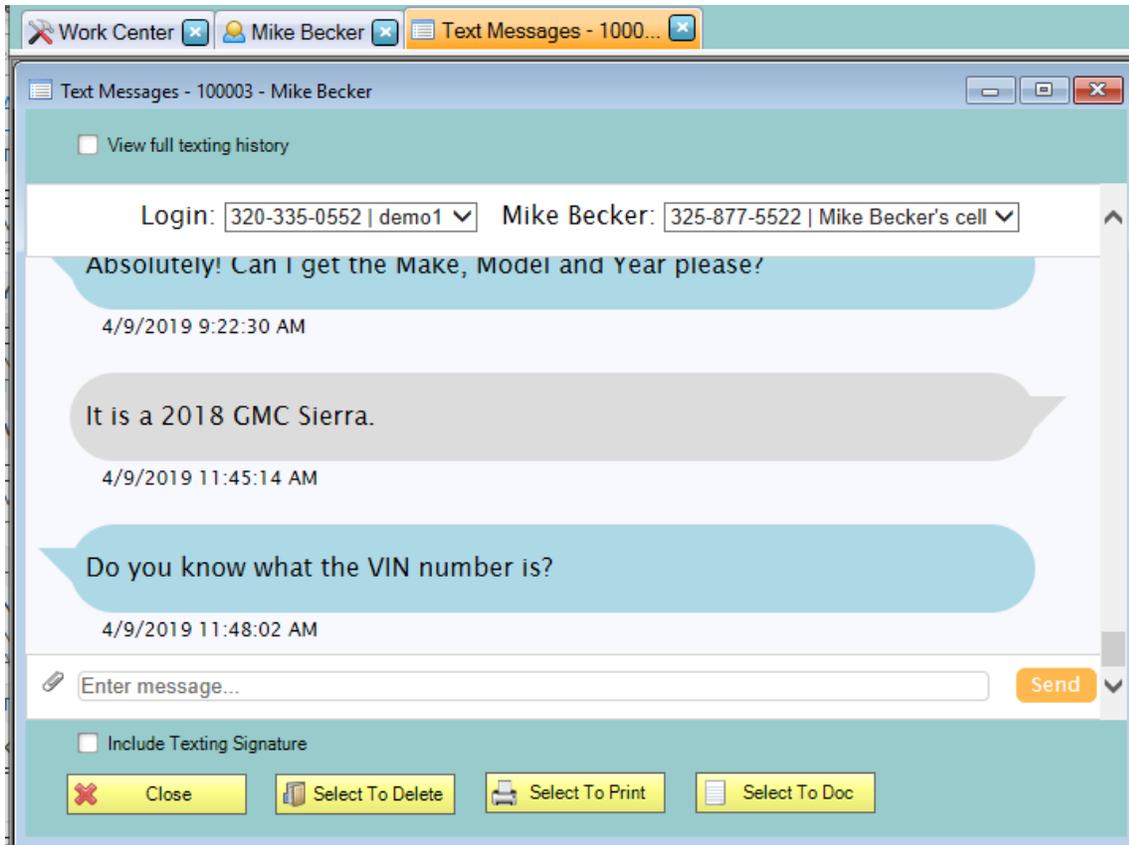
- The dates at the top of the window default for the last week. This date range can be changed to show text messages for a shorter/larger date range if needed.
- The drop-down box to the right of the dates defaults to the current login.
- The Refresh button reloads the window with updated information when changing the dates or login.



- Each row in the grid represents a text conversation in Eclipse. The number in orange represents the new texts that have arrived since the specific conversation was last opened for the login indicated in the drop down at the top of the screen.

- The blue dialog box  to the left of the conversation will open the Text Messages window with all texts that are a part of that conversation.
- If the user clicks any other place on the row, both the customer identified and the conversation window will open.
- Click Close when done with the Text Message Conversations window.
- Click Retrieve to check for new text messages. A message box appears "This will manually override the set interval for text retrieval. Do you want to retrieve Texts?" Click 'Yes' to force Eclipse to check for new text messages. By default, Eclipse will check every 10 minutes for new text messages. When complete, a message will be added to the status bar just below the button stating "Manual Text Retrieval Completed."
- Click Help for documentation regarding Twilio Texting Setup.

When the blue dialog box  is clicked from the Text Message Conversation window the Text Messages window displays. This screen shows all text messages that make up that specific conversation. By default, the window opens to the current login in Eclipse and a specific texting number for the customer associated with that conversation. Changing either of these will reload the conversation with data pertaining to the login and texting number.



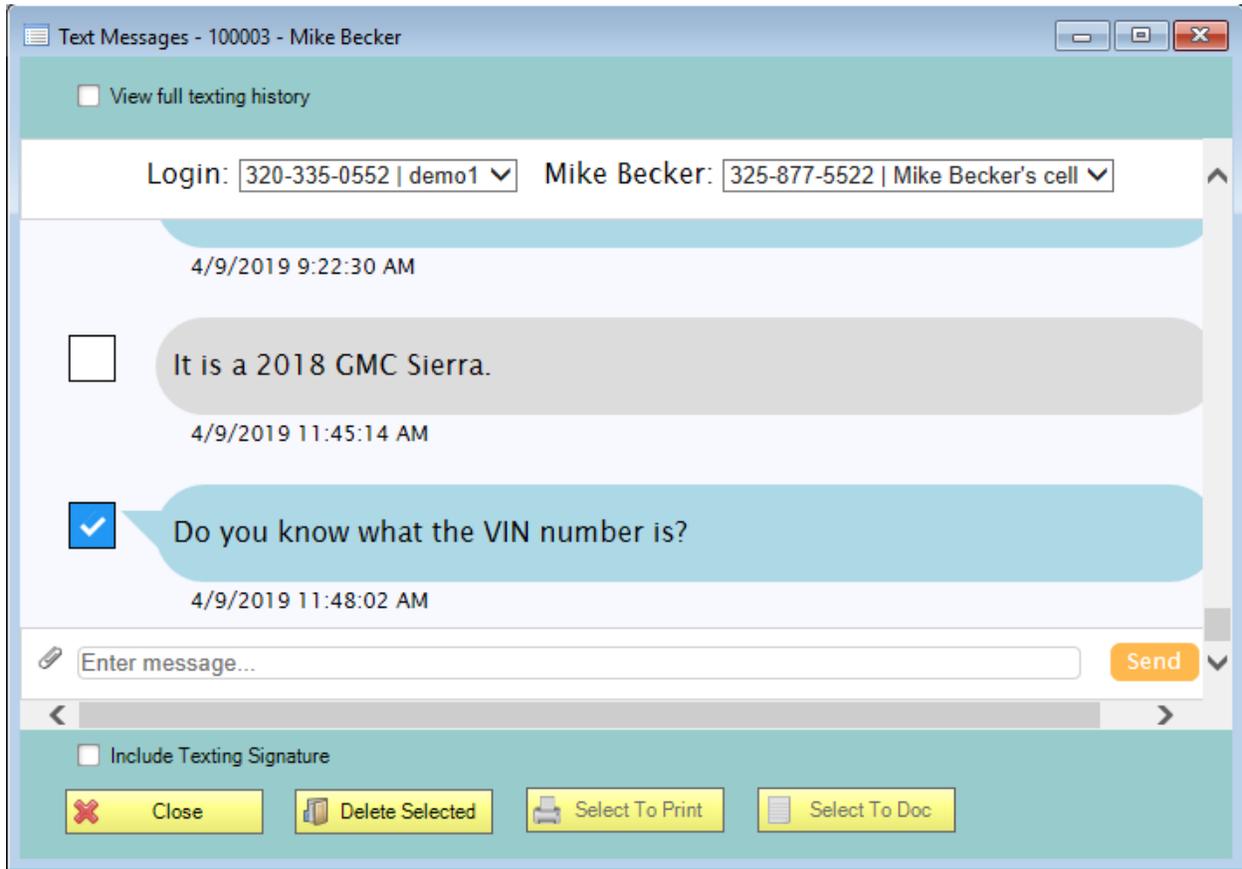
To get to the Text Messages window from a customer, click on Correspondence and Send Text Messages. The Text Messages window will open to the text messages from the customer's first cell phone number in the customer phone list.

By Default, this window will show only text messages that have not been documented and moved from the Text Message window.

The check box at the top of the window, "View Full Texting History" will include previous text items that have already been documented from this message.

When in this view, if parts of the conversation have already been documented, the **Select to Doc** and the **Select to Delete** button will be disabled.

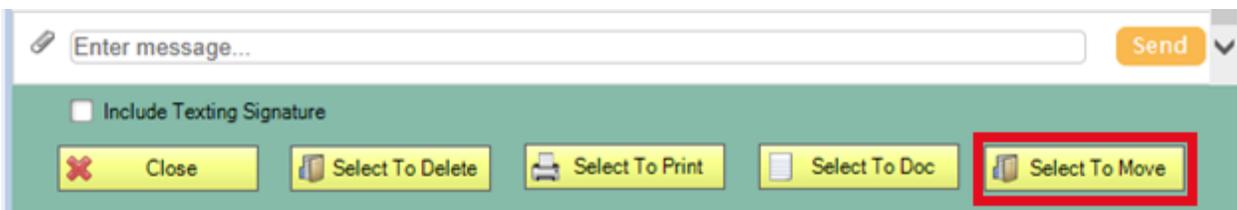
Selecting Text Messages to Delete, Print or Document



When one of the "Select" buttons at the bottom is clicked, the window provides check boxes next to each text message to select which text message you want to Delete, Print or Document. After the selections have been made, click the same "Select" button to complete the process.

To select all messages in the conversation, use the keyboard combination of Ctrl + M.
To unselect all messages in the conversation, use the keyboard combination of Ctrl + U.

In the event you have two customers with the same cell number, such as a personal account and a business account, a fourth button 'Select To Move' is visible and will allow texts to be moved from one customer to another.

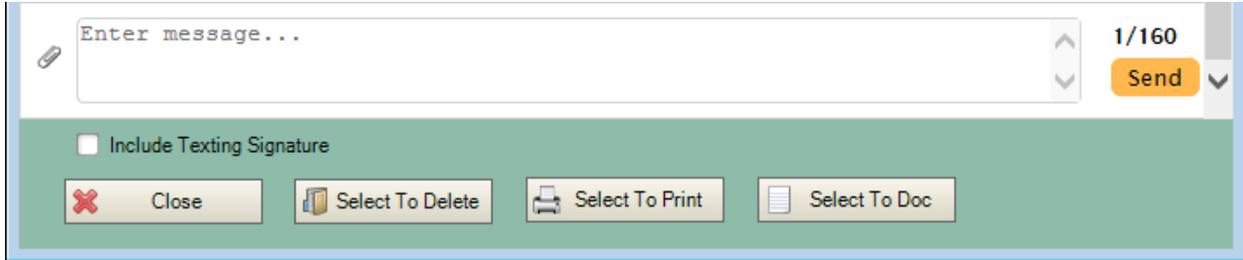


If the cell number is only on one customer this button will not appear.

Sending Text Messages

The message box has a built in spell check.

Text can also be copied and pasted into the message box by right clicking in the box and selecting copy or paste or by selecting Ctrl + C to copy and Ctrl + V to paste.



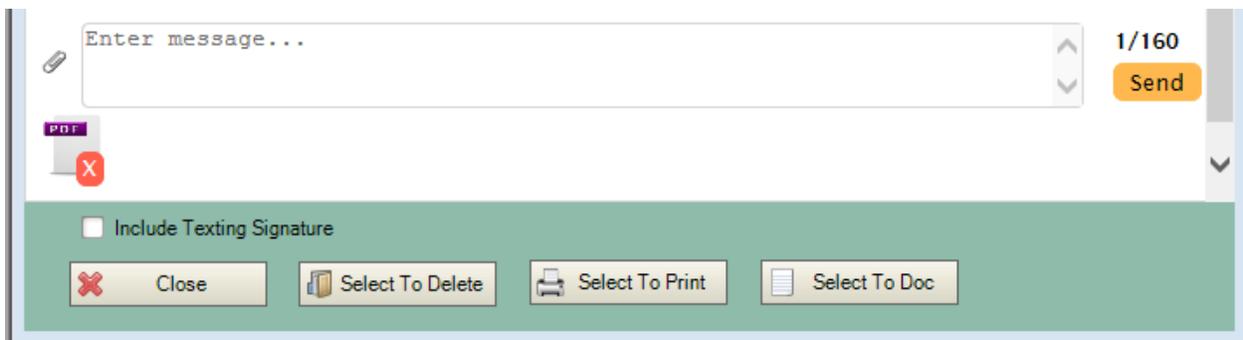
To send texts to the selected number in a conversation, type a message where it says, **Enter message....**

A text message can be up to 160 Characters, before it will break it out into multiple 'Segments'. Each 'Segment' counts as a text, so when you have a text that exceeds 160 characters, it will count as multiple text messages.

- * 160 Characters = 1TXT Message
- * Each Attachment = 1 TXT Message

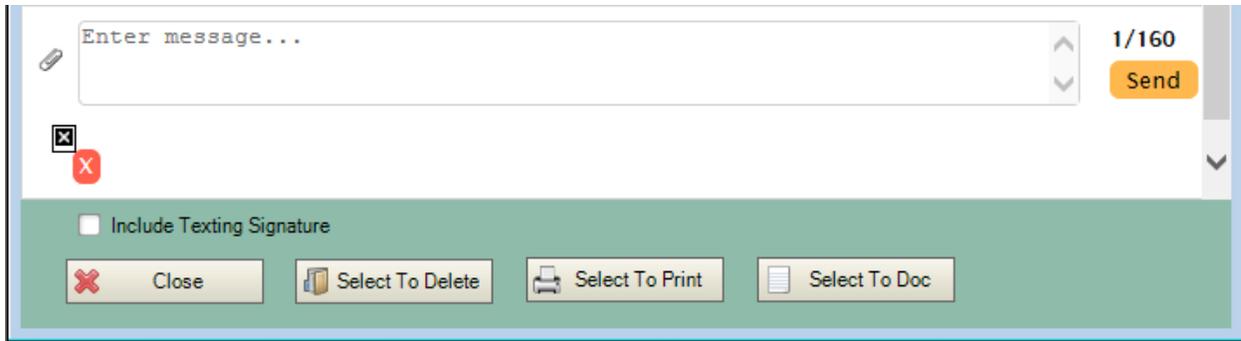
To add pictures or PDF's to a text, click on the paper clip icon  to the left of the message box. *The following attachment types can be sent in a text message: PNG, JPEG and PDF.*

A dialog box will open, defaulting to the user's Pending Attachments folder, but allows navigation to other locations on the computer to make a selection. After that selection, a copy is placed into the Pending Attachments folder on the server and is used to send along with the text. After the sending is complete, the file in the servers Pending Attachments folder is deleted. The file in the user's Pending Attachments folder will not be deleted.



After making a selection, a thumbnail representation of the image or PDF is placed below the message. Prior to sending this text, if the user clicks on the thumbnail it will open with the default program for the type of attachment on the computer. If the user clicks on the red 'X' on the thumbnail the attachment will be removed and will no longer be sent as a part of the text.

If a black 'X' appears with the attachment, instead of a preview of your attachment, there is an issue with the attachment. The attachment will likely not be received by the recipient. Please verify the attachment, and try again.



To send the message, click the orange **Send** button to the right of the message.

Very long text messages may be broken into segments for some cell carriers; thus, the recipient will receive multiple texts to accommodate this circumstance.

Text Messages from Unknown Cell Numbers

As texts are received into Eclipse, the program looks to match the text message number to a cell number that is currently entered on a customer. Eclipse only recognizes phone numbers entered on the customer that have the 'Phone Type' as 'Cell' and are not marked as 'Opt-Out'.

If only one cell number is found, the in-bound text will be included on that customer's Text Messages window.

In the event that no customer is found for the text message, click on 'Unknown Name'. Eclipse will ask the user if they wish to add the cell number to a customer. After the number is added, click *Refresh* to verify the correct customer matches.

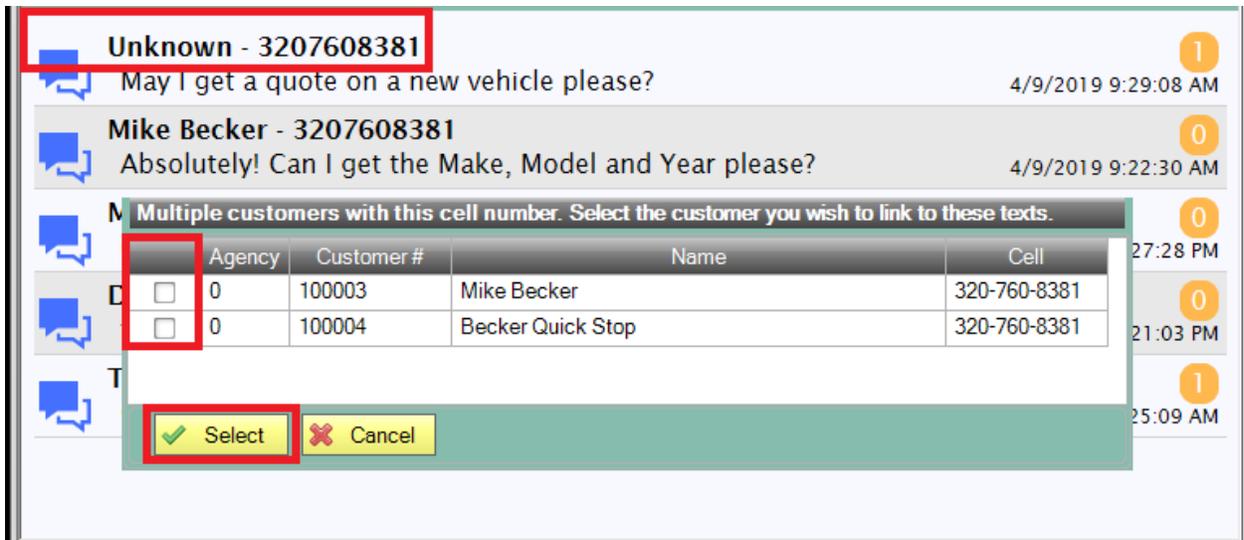


If the user is not sure who sent the text, click on the blue icon to open the Text Conversion window to allow the user to send a response text to get more information.

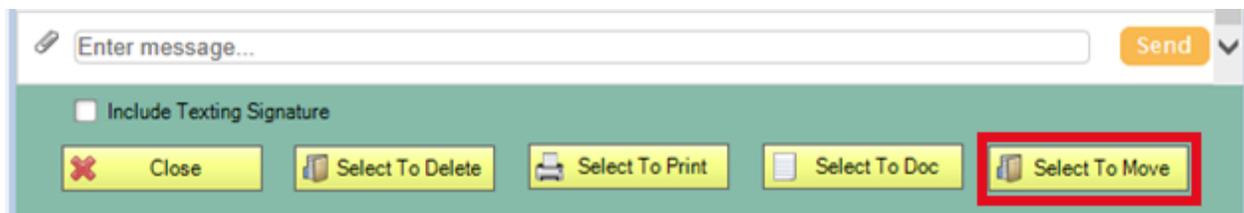
Texting phone numbers that are found on more than one Customer

In the event that two or more customers have the same cell phone number, the Text Message Conversations window will list the customer's name as 'Unknown'. Eclipse provides a way to identify which customer the incoming text should be connected to.

After clicking on the text message, an option grid opens. Put a checkmark in the box for the customer that message should be attached to. Click **Select** to update the text message to the correct customer.

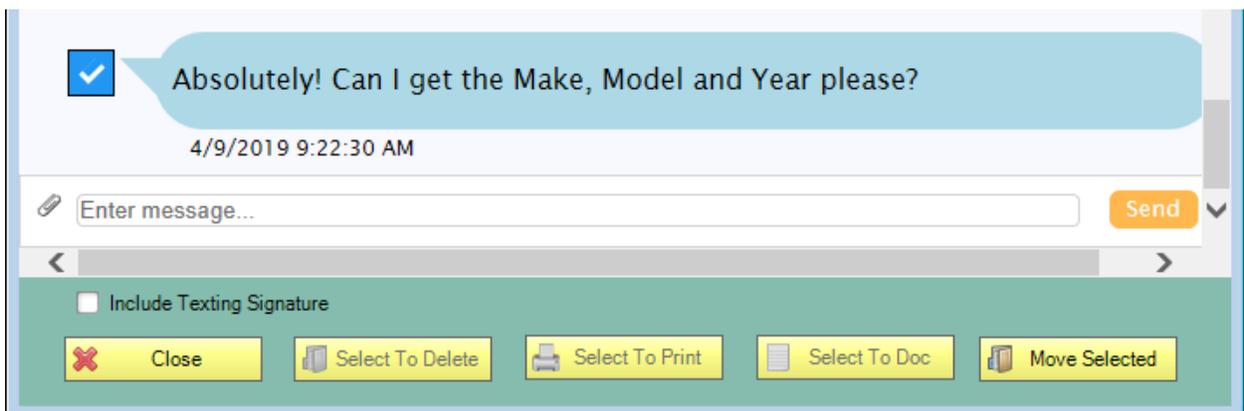


If it is later determined that the text should have been on a different customer, from the customer's Text Message window, click **Select to Move** to move the text to the correct customer.



The window will provide check boxes next to each text message to select which text message you want to move.

Click on the text(s) that should be moved to another customer file, then click **Select to Move** again.



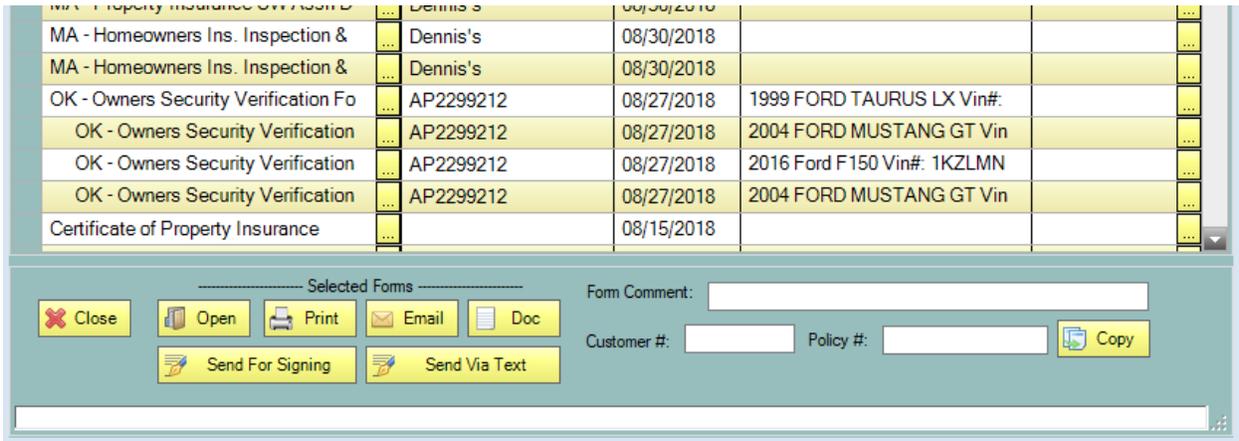
Another window will then open where you can select an alternate customer to move the text to. Checkmark the box next to the customer, and then click on the **Move** button to finish the process.

Select the customer you wish to move the selected texts to and click the Move button

	Agency	Customer #	Name	Cell
<input type="checkbox"/>	0	100003	Mike Becker	320-760-8381

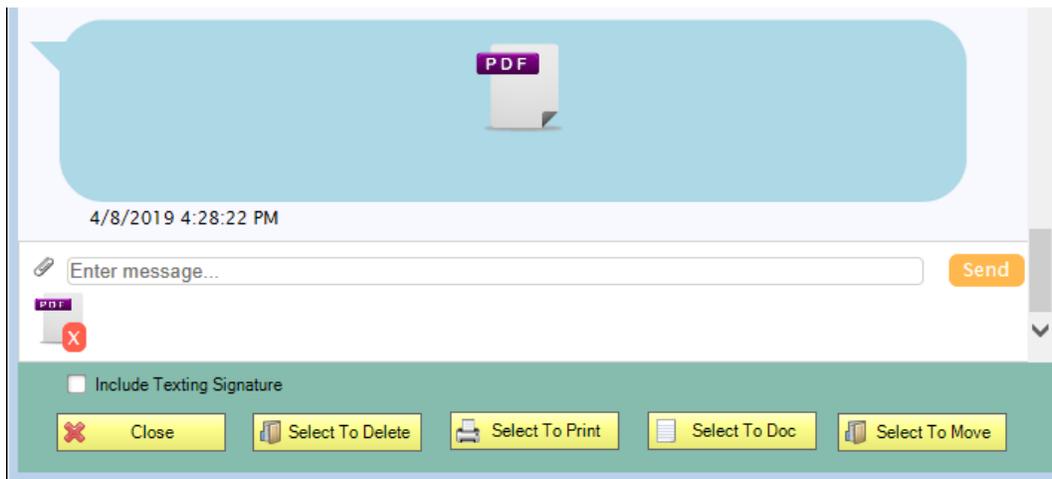
Move Cancel

Sending Acord Forms Via Text Message



From a customer's Acord List, ACORD Forms can be sent thru Twilio to a customer.

Select the row of the form(s) to be attached to the text and click the **Send Via Text** button. Sending the forms via text makes form fields unchangeable and combines the selected forms into one document.



The texting window will show the attachment(s) below the "Enter message..." field.

Enter in your text message and click .

Acord Forms sent thru text messaging will have a link to download the PDF to the recipient's mobile device. This link is valid for two days. After two days, the form will no longer be available to download and the Acord Form will need to be resent.

**If the Text Messaging window is already open when the button is clicked on the ACORD List, a message will appear stating "Text window is already open for this customer. Please close it before attaching ACORD forms." Click OK and close the Text Messaging window for the customer.

Sending Attachments from the Doc List

Attachments that are saved in the 'Doc List' in Eclipse can be sent as an attachment in a text message.

Go into a customer/policy screen, click on 'Doc List'.

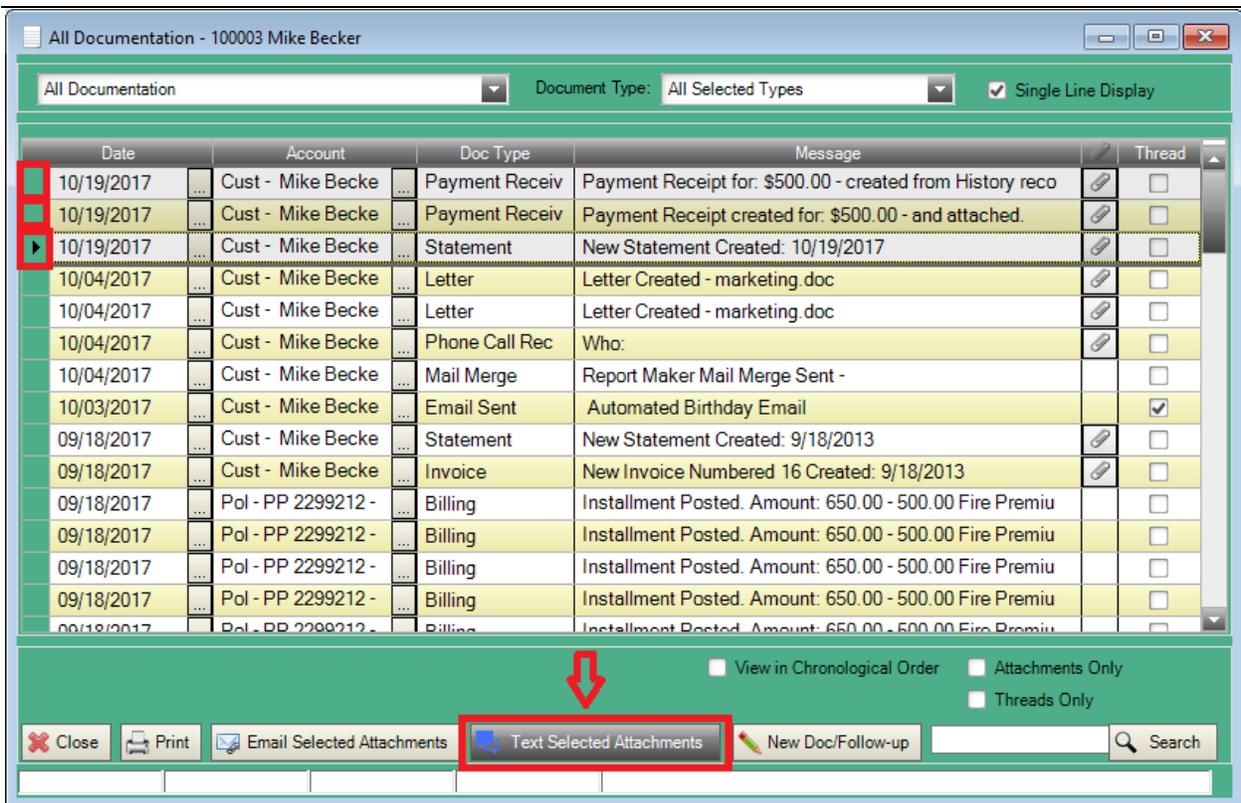
Highlight the row(s), by clicking to the left of the date.

Once the appropriate row(s) are selected, click "Text Selected Attachments" button at the bottom of the screen.

The texting window will open and show the attachment(s) below the "Enter message..." field.

Enter in your text message and click .

A brand new doc record will be created and will not append to an existing doc record.



To send an attachment that is on a specific Customer/Policy Documentation record, and have it append to an existing documentation, open the specific documentation record with the attachment.

Highlight the row(s), by clicking to the left of the date.

Once the appropriate row(s) are selected, click "Text Selected Attachments" button at the bottom of the screen.

The texting window will open and show the attachment(s) below the "Enter message..." field.

Enter in your text message and click .

Customer Documentation - 100003 Mike Becker

Attached To: Customer Documentation - 100003 Mike Becker

Doc Type: Payment Received Doc Entered By: Cary Knight

Date/Time: 10/19/2017 01:54:49 PM

Append To Doc Send Email

Append/Send Text

Payment Receipt for: \$500.00 - created from History record.

Add Attachments ▶ PayRec09120171019015449. Payment Receipt Created: 10/19/ 10/19/2017 1:54:49 PM

Add Images

Make Follow-up Track

Update Close Print Email Selected Attachments Text Selected Attachments