

Text Messaging (Purchase Option)

If you are an Eagle N Series customer (Option 8888 "Eagle N Series on system" = Yes) the Text Messaging feature gives you the ability to send one-way text messages. You'll be able to send generic text messages to customers from POS, MCR, ROA, and MOI. You can also notify customers when their rain check or special order has been received, notify customers if a service/repair order has a status change (i.e. Status changed to 'Complete'), or send customers a generic text message about a specific transaction.

Setup

Verify that option 1673 "Text Messaging (SMS) available on System" to Yes. To do this, click ID, type 1673, and press Enter. If the option is not set to Y, contact Epicor Direct at 800-538-8597. Once 1673 is Yes review and setup these options:

- Option 1678 "Text for start of text message" - Enter the text you want at the start of each text message or leave blank to have your store's Short Name start each text message.
- Option 1679 "Text for end of text message" - Enter the text you want at the end of each text message. For example: "Do Not reply to this message" or "Call xxx-xxx-xxxx for more details"



Note

If the customer replies to your text they will receive this auto-reply message "Replies to this message will not be seen, please call us with questions."

- Option 1674 "Send text message notifications to customers for these events" – select the events for which you want the system to send a text to the customer. Select R to send text once a rain check item is back in stock. Select S to send text once a special order item is received. Select M to send text once a service/repair order has a status change.

Hint! The Mobile Phone field is a dropdown – For customers in MCR, the Mobile Phone field is a dropdown list of all *eligible* phone #'s which exist for that customer in MCR. *Eligible* phone #'s are those that are 10-digits. The numbers show in order of: Cell # of 1st Primary Contact, Cell # of all other Contacts, phone number on the Main tab, alternate phone number on the Misc tab. It will typically default to blank so that the clerk can select the right cell # from the list, or enter one.

For customers not in MCR (transaction is for the default cash customer), on Special Order, Orders, and Service Orders the Mobile Phone cell # will default to the phone number already entered on the transaction

Details for each type of text notification:

Texting customers on demand – From POS, enter the customer in the header (mini or big) and press <Display>. Or from MCR, MOI, ROA, or POS bring up the Customer Viewer highlight the customer you want to text and press <Display>. In the Customer Detail Information dialog, click <Send Text> to display the dialog below. Enter or select the customer's cell number in "Mobile Phone" and enter your message in Message (up to 100 characters). You may also extend your message to up to 130 characters by overwriting the End Text which defaults to the value in Option 1679. Once the user presses OK, the text will be sent to the customer.

Main Account	Short ID
Cust # 4890 DON HERMANN LLC.	Short ID DONHERMAN

Send Text Message to Customer # 4890

Press OK to send text now

Mobile Phone: 9991234567 (User-Entered)

Start of Text: HAMPTON STREET HARDWARE

Message: Please call Accounting regarding your request for credit limit increase

End of Text: Call 123-456-7890 for details.

AC	SAN FRAN
IOJI	SAN FRAN
TTN	SAN MATE

Raincheck item received – if you are using the features of "Advanced Rainchecks" (option 5413 "Advanced Rainchecks in POS" = Yes) and would like to offer the customer a text notification when the item is back in stock, enter an R in the Option 1674 "Send text message notifications to customers for these events".

In Point Of Sale, if option 1674 includes R (Rain checks) the existing rain check dialog will have the new field "Text Message?" which defaults to N.. Enter Y and select or enter the customer's cell number if they want to receive a text once that item is back in stock. Enter the cell number as 10 digits, without dashes or parentheses.

Rain Check

Good until: - Rain check is good until

Phone: - Customer Telephone Number

Text Message?: - Send text notification to customer phone when the item is available

Cust Name: - Customer's name

When an item that has outstanding rain checks is received by the Receiving Report (RRP), the system will generate and send a text message that the item is available. A text will be sent to each customer that has a rain check on file for that item.

This is an example of the text message which will be sent where option 1678 is blank so the start of the text is the store's Short Name (i.e. "Hampton Street Hardware"), and option 1679 is configured for the text "Call 123-456-7890 for details".

Hampton Street Hardware - Rain check for 6PC BIT SET is now available Doc# 1585 Call 123-456-7890 for details
1:54 PM

The Receiving Report (RRP) has also been updated to document that a text notification has been sent.

RECEIVING REPORT (RRP) FOR EPICOR TEST TLJ				UPDATE PRICES				OPTIONS-F		1/
T P O #	HR	ST	VENDOR	REF #	CREATED	B	TERMS	SPECIAL	SHIP-TO	
LINE	ST	ITEM #	MFG #/SPL	T-REC	T-REJ	Q00	Q0H	AVG COST	COST	RETAIL
S D	A	DESCRIPTION		B-REC	B-REJ					
17093	A	1 2	PITULLA SALES, INC.				1/05/16	N	Due on receipt.	
1 1		78854	14475	5		5	32	6.475	6.44	19.99
F		N ACE FINISH NAIL 6D 2" 5#		E		0	77	6.47	6.44	19.99
		* RAINCHECK QUANTITY		2						
Notification text(s) sent for 1 rain checks for a total quantity of										

Note

- Once a customer receives notification that the item is back in-stock but fails to redeem the rain check, no unnecessary notifications will be sent on subsequent receipts of that item.
- No logic has been added to account for an item's total amount of out-standing rain checks being more than the quantity received (if % of Raincheck Quantity to order is less than 100%). For example if the item's total Raincheck Quantity is 20 which represents 20 different rain checks each with a quantity of 1. And if the % of raincheck quantity to order is set to 50%, then when the 10 are ordered and received, 20 texts will be sent out for each of the 20 rain checks – not just 10.

Special Order item received – if you are using the features of "Advanced Special Orders" (option 1028 "Special Orders Allowed at POS" = A) and would like to offer the customer a text notification when the item has been received, enter an S in the new Option 1674 "Send text message notifications to customers for these events". This capability applies to items on Special Order and Order transactions which are sourced to a PO (the item on the customer order has the link to the PO). If a cell number is entered on the special order or order transaction a text will be sent when the RRP option F finalizes the receipt.

In Point of Sale, if option 1674 includes S (Special Orders), after totaling a new or maintained Special Order or Order transaction use choice G on the Finish Special Order Menu or the Finish Order Menu. On the Fax, Email, or Text Menu select S to 'Request Text when Special Orders Received' which displays the dialog below. Enter or select the customer's cell number in "Mobile Phone" and set "Send Text?" to Yes if they want to receive a text for special order items received as they are received by the Receiving Report (RRP).

Send text when special order item received

Do you want to notify the customer when special order items are received?

Mobile Phone: Main Phone

- Enter cell number and Y in Send Text to send a text notification

Send Text?:

When an item linked to a special order or order is received by the Receiving Report (RRP), the system will generate and send a text message notification to the customer that the item has been received and is ready for pickup. Backordered items not sourced to a specific PO will receive a text if you use the Receiving Report (RRP) Option FP to allocate quantity received to un-sourced backorders and the order or special order has a cell number entered and 'Send Text?' set to Yes.

This is an example of the text message which will be sent where option 1678 is blank so the start of the text is the store's Short Name (i.e. "Hampton Street Hardware"), and option 1679 is configured for the text "Call 123-456-7890 for details".



Note: If multiple special order items have been received for a customer order, only one text will be sent, and instead of showing the item's description the text will show 'Multiple Items Received'.

The Receiving Report (RRP) report has also been updated to document that a text notification has been sent.

HAMPTON STREET HARDWARE							01/27/16 14:49:4	
(925) 449-0606								
TO: ACCU-TOOL CO. P.O. BOX 2947 TOLEDO OH 43606 PHONE: (800) 537-8820 FAX : (419) 531-0697				SHIP TO: HAMPTON STREET HARDWARE				
VENDOR	ASSIGNED CUST#	REC METH	BACK	REFER#	CODES	FREIGHT POLICY	SHIP VIA	TERMS
5		A	N		G			SADF
LINE#	ST	QTY ORD	QTY RCVD	QTY B/O	ITEM/SKU NUMBER	DESCRIPTION	MFG# / SPCL	RCVD
1	1	2	2		2072692 SP ORD#:869488	DeWALT 3/8" CORDLESS DRILL 12V CUST#:*5 NAME:CAHTEST	DW927K-2 Text sent to	11 1234

Note

- Making a copy of an order / special order will remove the cell number and set the "Send Text?" flag to 'N' for the newly created transaction.
- Using the Receiving Report (RRP) Update Option P "Allocate uncommitted receipts to POS backorders" does support texting. If the customer's order or special order has their cell number entered in "Mobile Phone" and "Send Text?" is set to Yes, then as back-ordered items on that order are received and allocated to the customer order (by using RRP Option P) the customer will receive a text notification that the item has been received.

Service/Repair Order Status Change – if you are using the features of "Service/Repair Orders" (option 1093 "Service and Repair on System" = Yes) and would like to offer the customer a text notification when the service/repair has been completed (or any other status entered in option 9327), then enter an M in Option 1674 "Send text message notifications to customers for these events".

Important

One existing option and one new option needs to be setup for this type of text:

- Existing Option 9327 "Service Order status changes which prompt to email or text customer" – select each type of status change which should generate a text notification. (Note that this option also applies to the existing functionality of 'notification by email' option 9325.)
- New Option 1684 "Default for prompt to text customer when Service Order status changes"

In Point Of Sale or the Service Order Viewer, when a service order's status is changed to one of the status's entered in option 9327 this dialog below will appear. Enter or select the customer's cell number in "Mobile Phone" and set "Send Text?" to Yes if you want the customer to be notified of that change in the service order's status. Enter the cell number as 10 digits, without dashes or parentheses.

Once the user presses OK, a text will be generated and sent to the customer.

This is an example of the text message which will be sent where option 1678 is blank so the start of the text is the store's Short Name (i.e. "Hampton Street Hardware"), and option 1679 is configured for the text "Call 123-456-7890 for details".

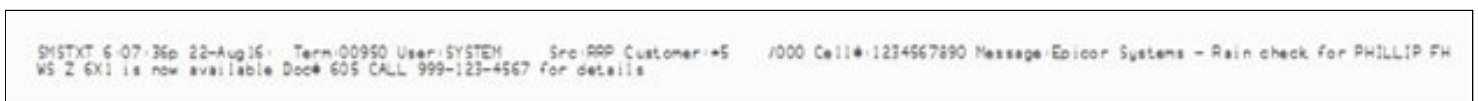


Texting for any transaction on demand – In POS when creating a new transaction or recalling and maintaining an existing transaction, after pressing <Total> you can send a generic text about that transaction. On the Totals screen, press <Menu>. On the Totals Menu selecting T to "Text Customer Now" will display the dialog below. Enter or select the customer's cell number in "Mobile Phone" and enter your message in Message (up to 100 characters). You may also extend your message to up to 130 characters by overwriting the End Text which defaults to the value in Option 1679. Once you presses OK, a text will be generated and sent to the customer. The text will contain the transaction's document #. You can text on demand from the Totals Menu on Sales, Credit Memos, Layaways, Orders, Special Orders, Estimates, Transfers, and ROAs.

Additionally on Orders, Special Orders, Estimates, and Layaways you may text on demand by selecting G on the Finish {transaction type} Menu, and then selecting T to "Text Customer Now" on the Fax, Email, or Text Menu.

Verifying a text was sent -The "Text Message Log" in SHOWLOG will record when a text is sent:

Rain Check:



Special Order:

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SMSTXT 6:12:50p 22-Aug16: Term:00950 User:SYSTEM Src:RRP Customer:*10318/000 Cell#:1234567890 Message:Epicor Systems - Special Ord for GLASS JAR  
W/CORK 8oz Qty 4 is now available Doc# 606 CALL 999-123-4567 for details
```

Service/Repair Order:

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SMSTXT 6:17:00p 22-Aug16: Term:00950 User:SYSTEM Src:POS Customer:*5 /000 Cell#:1234567890 Message:Epicor Systems - Service/Repair Order is  
now Complete Doc# 607 CALL 999-123-4567 for details
```

Text on Demand

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SMSTXT 6:23:21p 22-Aug16: Term:00950 User:SYSTEM Src:0000 Customer:*5 /000 Cell#:1234567890 Message:Epicor Systems: Your Delivery leaving yard  
now, should arrive in less than one hour Doc# 608 CALL 999-123-4567 for details
```

If the text is not received, refer to these two logs in SHOWLOG:

- Web Service Error Log
- Web Service Audit Log