Text Message Reminders

Jacob Beimers - 2025-12-31 - Setup

Overview

SalesPad can send text message reminders using the Smart Printing functionality. To send text reminders, the user will need to sign up for a new or use an existing service provider.

Supported Service Providers

SalesPad supports Data24-7 and Twilio services for sending text messages. These services charge a small fee for each text and the fee varies based on the service used.

-Data24-7

https://www.data24-7.com

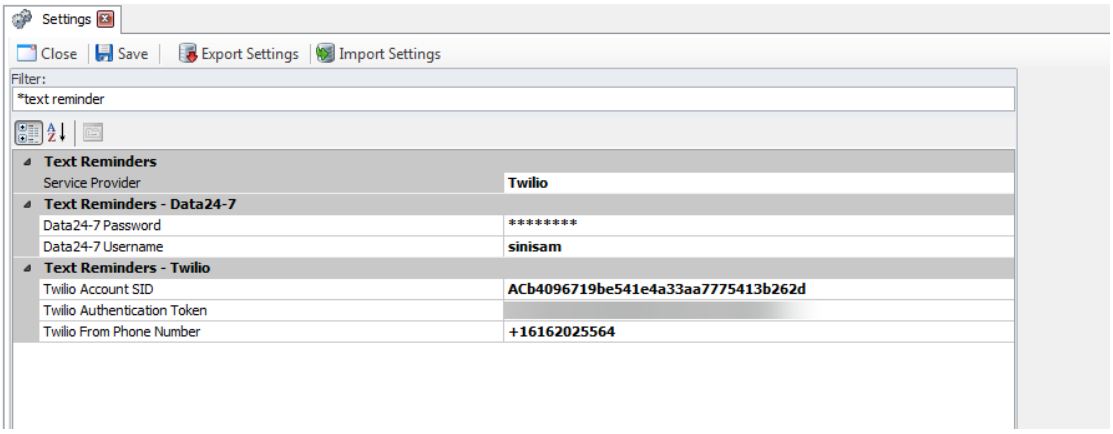
Data24-7 is a lookup service. SalesPad will query the Data24-7 service that will return the email address of a mobile phone number to which a text message will be sent. After a successful lookup, email is used to actually send the text message. Please note that Data24-7 lookup rates might be cheaper than other services, but text message is limited to 160 characters and an SMTP email account is required to actually send the message.

-Twilio

https://www.twilio.com

Twilio has more features and sends text messages to a mobile phone number directly. There is no 160-character limit, but the fee per text message may be greater than Data24-7.

Settings

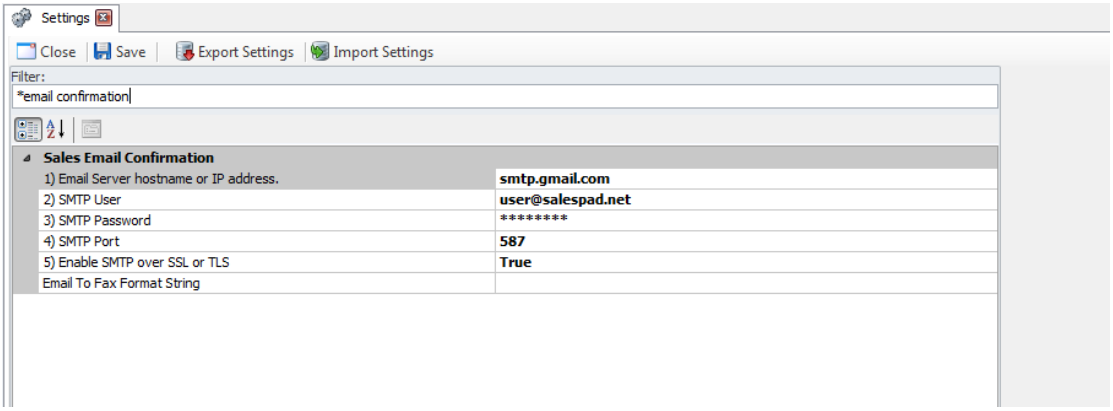


Service Provider – Service to be used when sending text message reminders. Current options are Data24-7 and Twilio. Data24-7 Password – Password used to log in to the www.data24-7.com service. Data24-7 Username - Username used to log in to the www.data24-7.com service.

Twilio Account SID – Account SID provided by Twilio that is required to communicate with Twilio API. Twilio Authentication Token – Token provided by Twilio that is required to communicate with Twilio API.

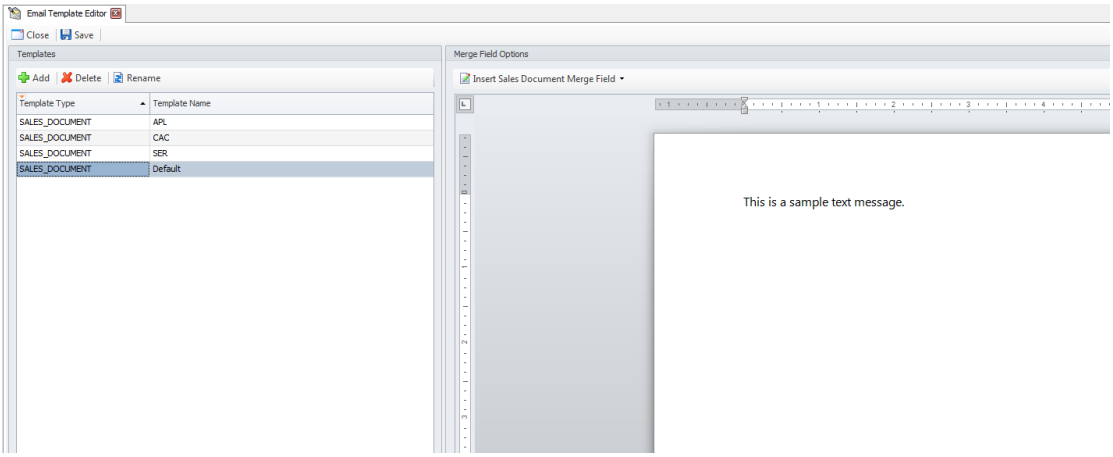
Twilio From Phone Number – Phone number from which text messages will be sent. It needs to be entered in the exact format provided by Twilio, usually +CountryCode AreaCode PhoneNumber (no spaces).

Note: If you are decide to use Data24-7 to send text messages, you will need to configure SMTP email as well. Please see SalesPad email documentation for more information.



Email Template Editor

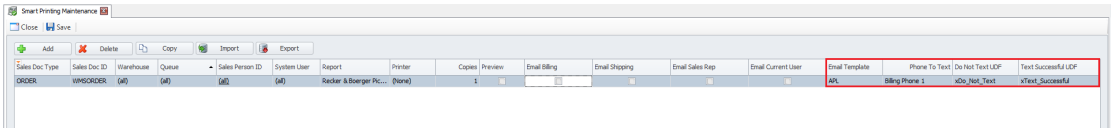
Email Template Editor is used to compose custom text messages. To start the Email Template Editor, please go to Modules -> Setup/Utilities -> Email Template Editor. Please refer to Email Templates on how to use it.

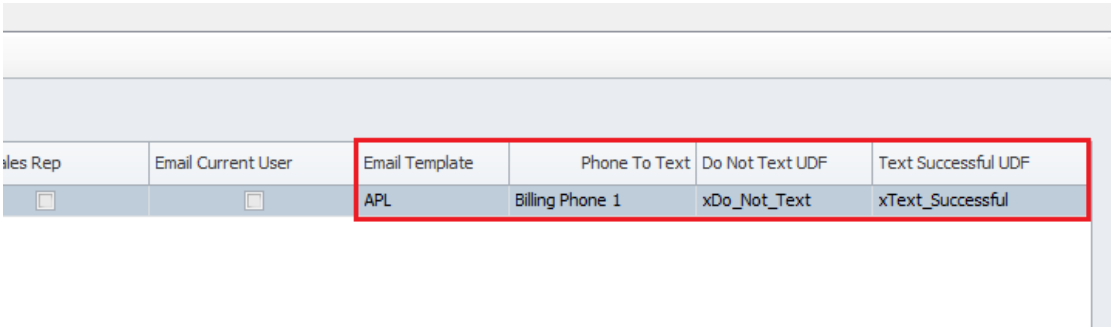


Note: Certain service providers, such as Data24-7, have a limit on how long a text message can be. Email Template Editor will not place restriction on the message length, but if the message exceeds the number characters that is supported, then the text message may get truncated.

Smart Printing Maintenance

To access Smart Printing Maintenance, go to Modules -> Setup/Utilities -> Smart Printing Maintenance. Text reminder settings are highlighted in red. You may need to set additional settings, such as printer name and report name, but these settings do not affect text reminders. If you do not see the options below, you may need to add them to the grid by right- clicking the grid header and selecting Column Chooser.





Email Template – Email template, created in Email Template Editor, to be used for generating text messages. If left blank, empty text messages will be sent.

Phone To Text – Billing or shipping phone number to which the text reminder will be sent. This field is required.

Do Not Text UDF – Boolean user field on the sales document that controls whether text reminder should be sent or not.

Text Successful UDF - Boolean user field on the sales document that is set to true if the text reminder was sent successfully.

Usage

Text reminders are sent from the Smart Printing plugin as sales documents are forwarded through the workflow. To access the Workflow Setup, go to Modules -> Setup/Utilities -> Workflow Setup. Choose Smart Printing from the Plugin dropdown and save your changes.

