Texting

05/23/2025 2:54 pm CDT

Overview

There are two (2) versions of texting in service**minder**.

INCLUDED: For US and Canadian customers, service**minder** has always included a texting option for en route notifications. These "en route" texts are a great way to unobtrusively let your customer know that someone is on the way, along with an estimated arrival time.

However, this mechanism does *not* support replies and also does not support our international users. Additionally, since these en routes all come from a common number, we have rate limiting to ensure the number is not blocked due to abuse, volume or content issues. (Learn more about rate limiting here)

NOT AUTOMATICALLY INCLUDED: Our **Two-Way Texting add-on** solves both of those issues, and provides additional functionality. When you add **Two-Way Texting** to your account, you'll be able to set up your own dedicated texting number. Your team (with permission) will have access to your organization's "Texting Hub." Any inbound message will be linked to the appropriate contact (or allow you to create a contact from the text). You'll also be able to initiate your own outbound texts to any contact or any Service Agent.

Recent requirements by carriers in the USA (The Campaign Registry organization) now require **all** 10-digit phone numbers to be registered by the business entities that use them. Once you set up your two-way texting number, you'll be prompted to go through a straightforward registration process.

Video Tutorial

Click here for a webinar on Two-Way Texting

Important Information on Fines/Penalties for Misuse of Texting function

serviceminder Business SMS guidelines

We are part of The Campaign Registry (TCR), which is the industry group that oversees business texting behavior, working to reduce spam, phishing and fraudulent messages. In 2023, the TCR changed registration rules for businesses, making them include Tax ID numbers and legal business names in their registration. Now, penalties are being imposed on businesses which engage in bad texting behavior, ranging from $500 - $1500 per violation.

If service**minder** incurs any financial penalty due to a serviceminder client's texting behavior, those fines will be passed on to that organization. Organization owners will be required to reimburse serviceminder for the amount of the fine/penalty PLUS a 5% administrative fee.

Please remember that express consent is required to automated text marketing messages to your customers and prospects. Transactional text messages, like appointment confirmations/reminders, proposals, and En Route notifications are not subject to all the stringent texting rules. However, it's the user's responsibility to know the rules and adhere to them. For instance, it is required to include "opt out" instructions on all "mass" or "automated"

texts, i.e. "Reply STOP to unsubscribe." Direct one-to-one texts with customers are not part of that requirement.

Click here to review the Telephone Consumer Protection Act

Getting Started

Registration

After you add **Two Way Texting** to your account (available in the Marketplace,) you'll be directed to the page set-up your texting number. If you are coming back to this process at a later time, click on the **Texting** tab on the left side of the page to resume.

If you ever need to alter this number or the banner isn't visible to set it up, navigate to this link: **Register Phone Number**

You can search in any area code (though we default to your default area code) as well as other prefixes. Not all exchanges support texting so depending on your area, selections may be limited. Once you've found a number you like, just click the "Save" button . The number will be live once your registration is accepted/confirmed.

Note that phone numbers in your area code might not always be available. You may have to search using other nearby area codes or come back at different times of the day to check availability for your preferred area code. Unfortunately, we do not have control over which area codes are available.

Once you've confirmed your number choice, click the "Register" button at the top right:
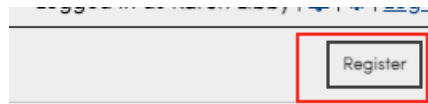
You'll then be directed to the registration page. Please fill this out carefully, making sure not to add extra spaces. You'll need to enter your legal business entity name just the way it's recorded on your official paperwork (note especially punctuation and such) from your state/province.

You will also need your Tax ID (likely an EIN). Learn more about Employer Identification Numbers.

Using your Two-Way Texting Feature

Texting Hub

Every organization with Two-Way Texting has a 'Texting Hub". This is accessible (with permissions enabled) via the "Texting" shortcut in the left navigation, or via the Control Panel>Two-Way Texting.

Once any user opens a text message from a contact (either on the web or on the mobile app) then the text is marked as "read." There is a control button to mark a text as "unread".

When multiple team members have access to texts, it's often hard to know if a "read" text has been responded to. To that end, there is a tab in the texting hub (web only) labeled "Open." This allows you to see any texts from the previous 2 weeks which have not been replied to (regardless of whether they are read or unread.)

Confirmation Options

When scheduling appointments, you'll see options to send text messages for the appointment confirmation and "en route." The text confirmations include a link to the appointment details.

Confirmations default to the contact's email. You can change it to Text and you can also put in a one time number for the text confirmation. If the customer replies to the confirmation, you'll be able to see it on the Text Messages page.

Sending a Text Message to a Contact

Next to each phone number displayed for a contact on the Details page will be a "Send Text" link. Just click that and type in your message. It will be sent to your contact when you hit **Send**. ServiceMinder automatically checks to see if the number is a valid text number, and will alert you if it's not- or if the contact has unsubscribed.
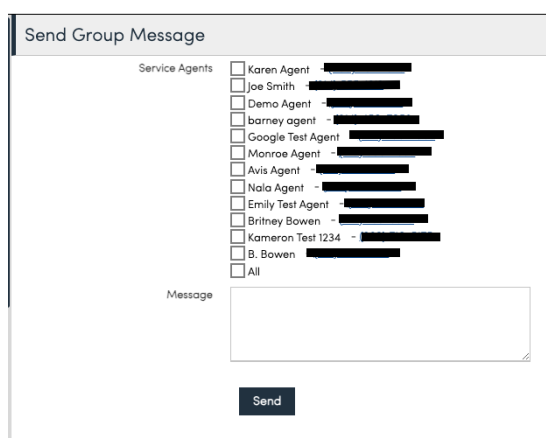
Texting to Your Service Agents

In the texting hub (left navigation panel under "Shortcuts",) click "Group Message". Choose the agents to be texted, enter the message in the box and hit send. This feature is a great way to get business done!

You can also use Text Templates that are created inside of Ad Hoc emails.

Text by Default

Text can only be set as the default method of communication with Contacts 'only after' the customer indicates that they would prefer text over email. Fines/penalties for texting without consent are pretty dramatic.

A client can update their preferences when accepting a proposal or when new appointments are scheduled (service**minder** updates their default communication preferences to their most recent appointment booking).

If a contact replies "Stop" to a text, then that contact will be marked as Do Not Text in our system. When sending proposals or anything to a "Do Not Text" contact, the text field will be empty/unselected. The only way for the contact to receive texts will be for them to reply "Start" or "Subscribe" on the Organization's account text thread.

For a better customer experience, we also have a "communication preferences" url which can be included in communications (emails or texts) which clients can click on to update their preferences.

Auto-responder

The Auto-Responder allows clients to request basic info about their account and upcoming appointments via text.

Advertising Your Number

You can use your text number for inbound marketing as well. Put it on your website with an sms: protocol to enable "click to text" to receive text messages from your customers. You can even have them text you pictures and you can attach them to the contact record for use in proposals or share with other users.

Unsubscribing

Contacts can unsubscribe from texting at any time by replying **STOP.** This will stop all text messages from being delivered to their phone number moving forward. They can choose to resume texting by replying **START.**

FAQs

Can I add the same texting number to multiple orgs?

No, each organization needs to have its own texting number. But, a single business entity with multiple organizations can have multiple texting numbers.

What happens if the contact calls our texting number?

They will hear an automated message that states "This is a text only number." A best practice is to include the organization's voice phone number in text templates. (i.e. "Want to talk the old-fashioned way? Call us at XXX-XXX-XXXX.")

How do I manually remove a customer from the texting list if they asked but didn't text STOP.

You can always ask them to text STOP, which will automatically unsubscribe them from texts. You can also go to the Contacts grid and upload a list - it can be just one person - and create a column header in the spreadsheet called "Do Not Text." If you put "1" for that contact in that column, it will automatically apply that in the system when uploading.

In data entry, a 1 means "Yes "and 0 means "No".

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			1	1	
			0	0	
			0	0	

I'm trying to create triggers for texting and nothing is showing up in the brand account.

If you are trying to incorporate two-way texting with Drips, you need to make sure that you have registered for the brand account. Many owners set up their two-way texting feature, but sometimes brand admins forget to do it in the sandbox or deploy template accounts. If the texting feature is not set up, the system will not allow you to create triggers or drip campaigns designed around them.

Also keep in mind that if you do create triggers and drips around texting and you deploy it to orgs without texting, their actions in the triggers will be blank and perhaps the drip setup won't work for them.

Learn more about Drip Triggers and Drip Campaigns.