Texting

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Overview

Two-Way Texting gives your organization a dedicated business texting number and a full messaging workspace inside ServiceMinder. With this feature, your team can send and receive text messages directly with customers or service agents, view conversation history, and attach inbound images to contact records. Every message is tracked and linked to the appropriate contact, making it easy to manage communication across your team.

Because customers increasingly prefer texting over phone calls or email, Two-Way Texting offers a faster, more convenient way to confirm appointments, ask questions, share updates, and handle simple service requests. It also supports automation through Drip Campaigns, allowing you to incorporate texting into lead nurturing or operational workflows. When paired with proper opt-in practices, Two-Way Texting becomes a powerful tool for improving responsiveness, reducing missed appointments, and enhancing the overall customer experience.

This article will review:
- En Route Texting vs. Two-Way Texting
- Getting Started
- Using Two-Way Texting
- Important Information on Fines and Penalties
- FAQs

Video Tutorial

En Route Texting vs. Two-Way Texting

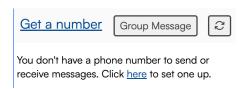| Feature	Included En Route Notifications	Two-Way Texting (Add-On)
Availability	Included for U.S. and Canadian accounts	Optional add-on (requires purchase)
Supports Replies	No – one-way only	Yes – full inbound and outbound messaging
Dedicated Phone Number	No – uses a shared number	Yes – each org receives its own number
Rate Limiting	Yes, shared-number limits apply (100 texts per organization per billing cycle).	No shared-number rates; subject only to carrier rules
Message Types	En Route notifications only	Any customer or agent text (confirmation, questions, photos, updates, etc.)
Contact Linking	Not supported	Inbound messages link to contacts or create new ones

Feature	Included En Route Notifications	Two-Way Texting (Add-On)
Texting Hub	Not available	Fully available for team-wide communication
Drip Campaign Support	No	Yes – can use Send Text actions
Registration Required	No	Yes – The Campaign Registry (TCR) verification required
Best For	Quick "on the way" alerts	Full customer communication and engagement

Getting Started

Registration

After enabling **Two-Way Texting** in the Marketplace, you will be guided to the setup page to choose your dedicated texting number.

If you are returning later, navigate to the **Texting hub** in the Navigation menu or use this link: **Register Phone Number**.
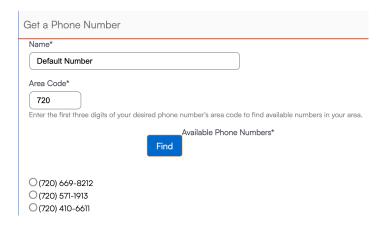
Get a number   Group Message   ⟳

You don't have a phone number to send or receive messages. Click here to set one up.

Choosing Your Number

Start with searching by your preferred area code. If no numbers appear under that area code, try alternate local area codes or check back later.

Because texting numbers come from national carrier networks, availability can vary based on the area code you search for. When you look for a number, inventories are queried from telecom providers to see what is currently unassigned and supports the required texting capabilities. In some regions, local carriers may have limited or no numbers available at that moment. Regulatory requirements and carrier-specific rules can also affect what numbers are offered. For these reasons, **your preferred area code may not always appear**, and availability can change throughout the day as carriers update their inventories.

Once you choose a number, click **Save** to confirm.

Get a Phone Number

Name*

Default Number

Area Code*

720

Enter the first three digits of your desired phone number's area code to find available numbers in your area.

Available Phone Numbers*

Find

○ (720) 669-8212
○ (720) 571-1913
○ (720) 410-6611

Once you've confirmed your number choice, click the **Save** button at the bottom of the page, then confirm your selection.

Register Number
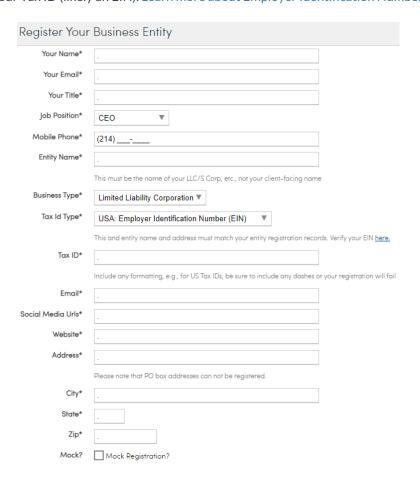Are you sure you want to use (720) 669-8212 as your primary number for sending and receiving text messages?
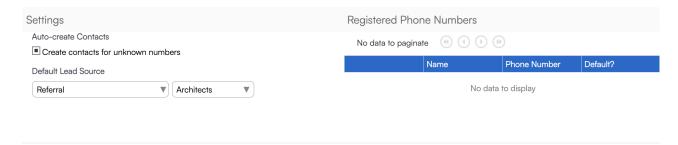
Yes **No**

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 from your state/province.

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

Register Your Business Entity

Your Name*	.
Your Email*	.
Your Title*	.
Job Position*	CEO ▼
Mobile Phone*	(214) ___-____
Entity Name*	.

This must be the name of your LLC/S Corp, etc., not your client-facing name

Business Type*	Limited Liability Corporation ▼
Tax Id Type*	USA: Employer Identification Number (EIN) ▼

This and entity name and address must match your entity registration records. Verify your EIN here.

Tax ID*	.

Include any formatting, e.g., for US Tax IDs, be sure to include any dashes or your registration will fail

Email*	.
Social Media Urls*	.
Website*	.
Address*	.

Please note that PO box addresses can not be registered.

City*	.
State*	.
Zip*	.
Mock?	☐ Mock Registration?

Further settings and all registered phone numbers can be reviewed and configured in **Control Panel > Two-Way Texting**:

- **Auto-create contacts** for unknown numbers
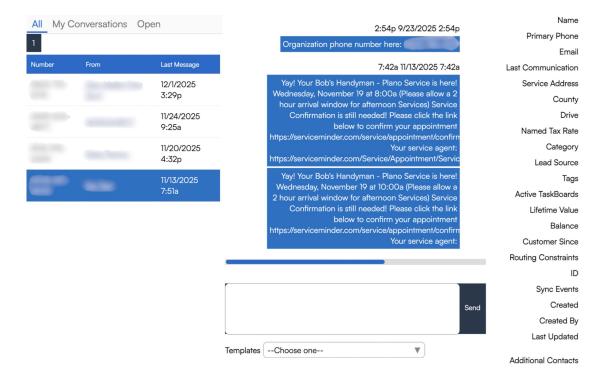- **Default Lead Source** mapping for those newly created contacts

Settings	Registered Phone Numbers		
Auto-create Contacts	No data to paginate ⏮ ◀ ▶ ⏭		
☑ Create contacts for unknown numbers	**Name**	**Phone Number**	**Default?**
Default Lead Source	No data to display		
Referral ▼ Architects ▼			

Using Two-Way Texting

Texting Hub

The **Texting Hub** allows your team to receive, read, and respond to messages. It is accessible in the left navigation bar for users with texting permissions.

On the left, you will see three tabs:

- **All:** All text threads from this organization.
- **My Conversations: T**ext message conversations that are associated with your user account.
- **Open:** Shows any messages from the last 2 weeks that have not received a response (helpful for team accountability).

Click on any record to open the full conversation history in the center column of the page. Once that has been opened, it will be marked as "Read." To mark it as "Unread" again, click the "**Mark Unread**" button at the top of the thread.

On the far right, you can review the associated contact details. To view the full contact details page, click the contact's hyperlinked name.
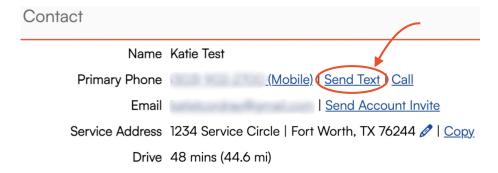
Confirmation Options

When scheduling appointments, you can choose to send:
- **Text confirmations**, including a link to appointment details
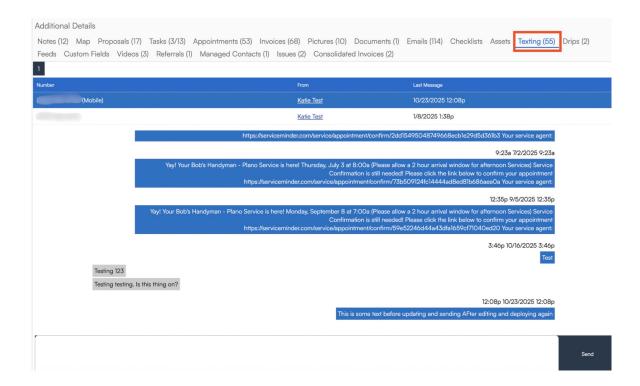- **En Route notifications**

Confirmations default to the contact's email but can be switched to texting. You may also enter a one-time mobile number for that appointment. Any replies will appear in the Texting Hub.

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 next to their phone number. 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.

You can also send a text or review conversation history in the **Additional Details** section of the contact details page under the **Texting Tab**.

Text by Default

A contact can only be set to receive texts **by default** if they have previously indicated a preference for texting. Customers can update preferences when accepting a proposal or scheduling an appointment.

Use the shortcode **{appointment.communication_pref_url}** to generate a custom **communication preferences link** which can be included in emails or texts to let customers update their settings independently.

Auto-responder

The Auto-Responder feature lets customers text keywords to receive basic account information, such as upcoming appointment details.

Below are all of the currently-supported words that the auto-responder supports.

Word	Description
help	Shows the message and data rates disclaimer as well as the ability to send STOP for stopping *all* text messaging.
info	Returns a list of currently supported words.
next, next appt	Returns the date and time of the next appointment along with the Live Tracking link.
whoami	Returns the client's name and address associated with the number.

By law, we support recipients option to "**opt in**" or "**opt out**" of text communication with your texting number. The following words, when sent to your two-way texting number, will add the sender to a virtual black list and block any future texting to that number:

- STOP
- STOPALL
- UNSUBSCRIBE
- CANCEL
- END

- QUIT

A number that is on the virtual black list will not be able to be sent to from service**minder**.io. You will see an error if you try to send to one of these numbers inside the texting hub or from the contact details page's texting tab. The black list function is implemented by our texting delivery provider -- we have no real-time visibility into blocked numbers.

Once a client has opted out of future texts, the only way to be able to send to them again is if they send one of the following words to your texting number:

- START
- YES

Advertising Your Number

You can display your dedicated text number on your website using an `sms:` link for click-to-text functionality. Customers can also send images, which can be saved to their contact record for use in proposals or internal notes.

Texting to Your Service Agents

In the **Texting** hub 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!

Important Information on Fines/Penalties for Misuse of Texting function

ServiceMinder is part of **The Campaign Registry**, the industry body that enforces business texting rules to reduce spam and fraud. As of 2023, all businesses must register 10-digit texting numbers using their legal business name

and Tax ID. Violations of texting regulations—such as sending unsolicited marketing messages without consent—can result in carrier fines ranging from **$500–$1,500 per incident**.

If ServiceMinder receives penalties based on a client's texting activity, those fines will be passed on to the client's organization, along with a **5% administrative fee**.

Key compliance reminders:
- **Express consent is required** for any automated or mass marketing texts.
- Transactional texts (appointment reminders, confirmations, proposals, en route notices) have fewer restrictions but must still follow carrier rules.
- All automated or mass texts must include opt-out instructions, such as **"Reply STOP to unsubscribe."**
- Direct one-to-one texting does **not** require opt-out language.

Click here to review the Telephone Consumer Protection Act

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".

T	AU	AV	AW	AX	
ged By	Tax Rate	Territory ID	Do Not Text	Online Accou	Nick
			0	0	
			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.