



## Kemp's Case Works, Inc.

### Text Messaging

Prime 16 utilizes technologies made available through Venture Technologies and Twilio to provide users with the ability to text clients. This new texting feature is very easy to use in Prime.

Organizations can easily set up an account with Twilio, including purchasing a phone line. Settings within Twilio are set to point to a website made available within Venture Technologies to allow the update of text messages (such as whether the text was sent and delivered). Within Prime, input appropriate Twilio account information:

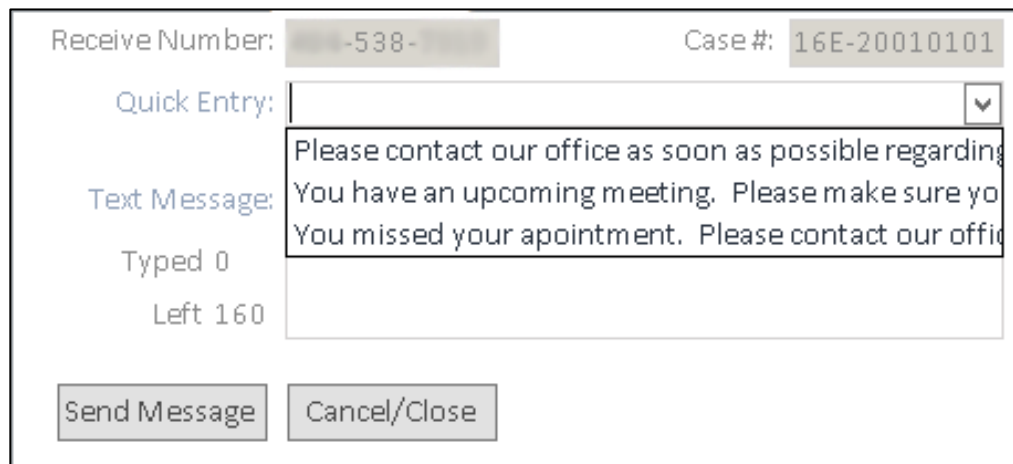
Twilio Setup		Close
ID (checked)	<input checked="" type="checkbox"/> This must always be checked	
ACCOUNT SID	<input type="text" value="AC944bf"/>	Twilio account SID
AUTHTOKEN	<input type="text" value="5341d0"/>	Twilio account authtoken
Status Callback	<input type="text" value="http://prime.caseworks.com:11818/"/>	Web address for callback info from Twilio about the status of the text message
Twilio #	<input type="text" value="404-476-4365"/>	Outgoing Twilio phone number
Text Response	<input type="text" value="Sorry. We don't respond to texts. Please call our office at (417) 51"/>	Standard response sent to incoming texts
Call Response	<input type="text" value="Thank you for calling. This number does not accept incoming calls"/>	Standard response to incoming calls

The setup is then complete. The “Text Response” entry is what is returned to a person, should they send a text to your Twilio phone number. The “Call Reponse” entry is what would be spoken to the caller, should they call your Twilio phone number.

Within the client record a new checkbox indicates whether the client has indicated it is okay to text to his cell number. If that box is not checked, the system will not text the client. Additionally some basic checks are performed of the cell area code and phone number to ensure they are an appropriate format. The cell area code should be a number, three digits long. The cell phone number should be in a format of XXX-XXXX:

Cell :	<input type="text" value=""/>	<input type="text" value=""/>	Safe	<input type="checkbox"/>
	Okay to Text <input type="checkbox"/>			
	Send Text		Texts	

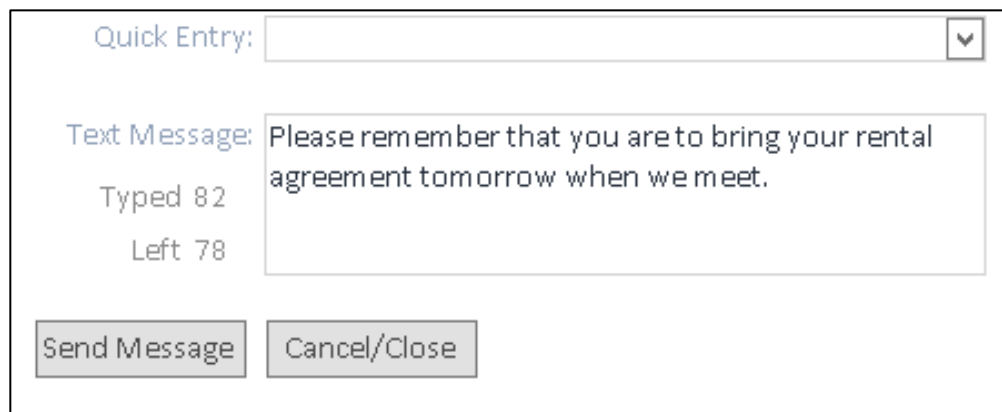
Pressing the “Send Text” button causes the text form to appear for entry of a text message:



The screenshot shows a web form for sending a text message. At the top, there are two fields: "Receive Number:" with the value "-538-" and "Case #:" with the value "16E-20010101". Below these is a "Quick Entry:" dropdown menu. The dropdown is open, showing a list of pre-written text messages. The first message is "Please contact our office as soon as possible regarding", the second is "You have an upcoming meeting. Please make sure yo", and the third is "You missed your apointment. Please contact our offic". Below the dropdown is a "Text Message:" text area. To the left of the text area, it says "Typed 0" and "Left 160". At the bottom of the form are two buttons: "Send Message" and "Cancel/Close".

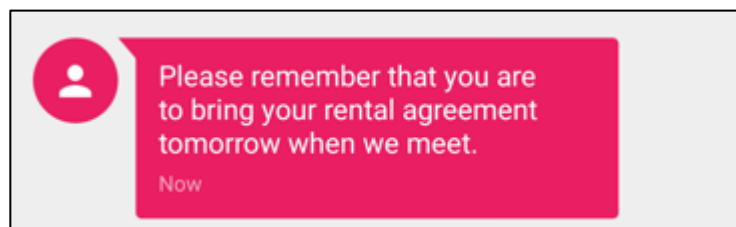
The “QuickEntry” drop down allows for the quick selection of a variety of standard text messages. Once selected, the message can be customized to include information such as meeting times, phone numbers to calls, etc. A text message can also be typed in the “Text Message” field.

To conform to standard text message requirements, only 160 characters are allowed. As a message is typed, the total characters used and those remaining is displayed. Once 160 characters is reached, no additional input is allowed:



This screenshot shows the same text message entry form as the previous one, but with a message typed into the "Text Message:" field. The message is "Please remember that you are to bring your rental agreement tomorrow when we meet." To the left of the text area, it now says "Typed 82" and "Left 78". The "Quick Entry:" dropdown is still open, showing the same list of messages. The "Send Message" and "Cancel/Close" buttons are still at the bottom.

Pressing the “Send Message” button causes Prime to contact Twilio and request the text message be sent. The client should then receive the message:



Prime tells staff whether the message was accepted and the current status of that text message:



Pressing the “Texts” button in the client record will bring up the text messages that have been sent in a case:

Message	Please remember that you are to bring your rental agreement tomorrow when we meet.	
Sent	8/17/2016 2:30:55 PM	Message Status
To	404-538-7319	

Within a text message, the “Message Status” will show the status of the message from Twilio:

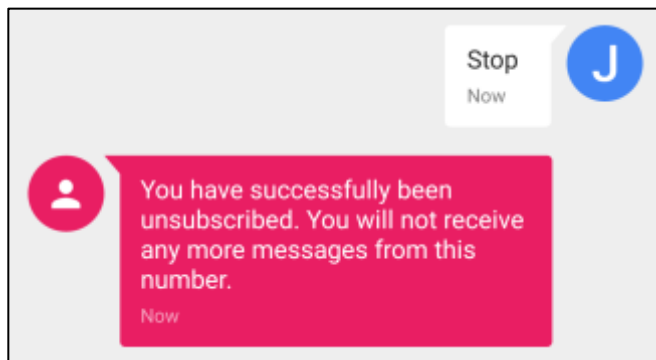
Message Status		Close
Status	queued	
Date Time	8/17/2016 2:30:55 PM	
Status	sent	
Date Time	8/17/2016 2:30:56 PM	
Status	delivered	
Date Time	8/17/2016 2:30:56 PM	

A status of queued is the initial status, indicating that Twilio has accepted the text message and will attempt to send it. A sent status indicates Twilio has sent the text message. Finally, a delivered status indicates that Twilio believes the message has been delivered to the recipient. A delivered status is not always provided. Some cell phone providers do not provide that kind of information. At best, an organization can only know that Twilio sent the text message. [Delivery should never be assumed, even with a delivered status.]

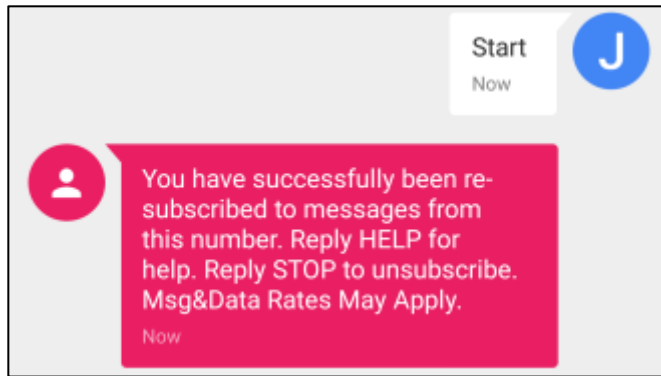
Twilio sends updates of text message status to the Venture Technologies website responsible for updating that information in Prime.

If a client texts to the Twilio phone number, Twilio queries the Venture Technologies website requesting instructions on what it should do. The website queries Prime for the information entered in the Twilio setup. The response text is returned to Twilio and then sent to the client as a text message.

If a client texts “STOP”, “CANCEL”, or “END” back to the number, Twilio sends that notification to the Venture Technologies website. The website updates Prime to indicate that cell number no longer wishes to receive text messages. This effectively unchecks the checkbox on the client record. Twilio also blocks the attempt to send text messages to that number again and the client is notified of that:



If the client decides later they do want to receive text messages, they can text “YES” or “START” to the number. Twilio sends that notification to the website and it updates the checkbox indicating it is okay to text to that number. Twilio will start allowing texts to that number again.



If a client calls the Twilio phone number, Twilio queries the Venture Technologies website requesting instructions on what it should do. The website queries Prime for the information entered in the Twilio setup. The response text is returned to Twilio. Twilio then speaks that message to the client.