

# Direct Texting Setup

1. Install the latest updates to the PowerSoftMD/EasyDent software; get support backup.
2. Make sure dot NET framework **4.6.1** or later is installed.
  - On command prompt, go to %windir%\Microsoft.NET\Framework then pick the directory with the most recent (highest-numbered) version.
  - run the command: **MSBuild.exe -version**
3. Office will setup account with Twilio, on their website <https://www.twilio.com/>
  - password must be 14 characters (ex: a phrase)
  - office will need to sign in to their email to verify
4. Sign in to Twilio, enter **office** phone number, on the screen where they try to text you, select option **to call instead**
  - Have office staff enter code on website
  - It asks "Do you write code?" respond "no"; then, click the lower-right "Skip to Dashboard" button
  - click "get a trial number" button
  - use [Show Advanced Search](#) to checkbox for toll-free number, then click "search", then "buy"
5. On dashboard, copy down into file on main drive: \EZW\TwilioInfo.txt
  - From Number (no punctuation)-
  - Account SID-
  - Auth Token-
6. On dashboard, click "Upgrade Project" button
  - tell office to enter office info, tax id, real billing info, etc. to go live
  - explain "Twilio keeps a balance in your account, Twilio subtracts from it whenever you send/receive texts...and they will charge card when it falls below certain thresholds"
  - click "upgrade account" button at the end
7. In the left-hand ellipsis (...) menu, click on TwiML Bins, save a new one named NoReply with:

```
<?xml version="1.0" encoding="UTF-8"?>
<Response></Response>
```
8. In the left ellipsis (...) menu, click Phone numbers, click the clients phone number and at the bottom of the page, in Messaging section, set the "A Message Comes In" portion to "TwiML Bin", then "NoReply"
9. In our software, go to Schedule-->"Tools"-->"Text Appt Notices"-->"Tools"-->"Setup"
  - Enter Account SID, Auth Token, Phone number
  - Prefix for output message (ex: office name)
  - Suffix for output text (ex: call with any questions & office line)
10. Schedule a test patient on unused day
  - click on patient, "Add Dem"-->enter test cell phone
  - then "Tools"-->"Text Appt Notices"-->-select the day, click "Send"
11. Training-
  - a) Sched-->Tools-->Text Appt Notices (appt reminders)
  - b) General screen-->Text (individual)
  - c) Schedule -> Click on Patient Name-->AddOptions-->Text Patient
  - d) Forms Menu-->Text Blaster (based on Patient Search By Criteria)
  - e) Primary Menu-->Lookups&Aids-->"Texting" (Receiving)
14. Email DTI Management that office is set up for Twilio