

Getting a store started with Texting / Creating a Twilio Subaccount

1. Create Invoice in TBM for store. ISBN = BM_SMS for \$50.00 (CAD store should be in CAD funds / USD store should be in USD funds)
2. Update store's BM (if needed – post mid-March 2019 should be good)
3. Make sure texting feature is enabled in BM. Setup -> Customer and AR -> Text Messaging Enabled?
4. Send test text by going to an invoice and printing. N)Notice ->T)Text ->Mobile Number (should be in customers account)
5. Processed through the “who is texting” screen and text preview screen -> Pgdn to send
6. Make sure cell phone got text message.

Once the BM_SMS invoice is tendered in BM, you should see the balance added to their Twilio balance on TBM Admin store page. As the store uses the texting feature, the amount will decrease.

The Billing of Texting/Twilio – (Taken from the Michael's Twilio newsletter emailed out 7/4/2019)

Twilio, the service provider we have developed texting with charges monthly for each phone number (one per store) and then for each text message sent. The default message Bookmanager sends is about 235 characters (2 segments) but can be up to 306 before the cost increases a bit.

For US stores, we are charging 2.7 cents per text (Canadian funds) and Canadians will pay 4.4 cents per text. Canada is more because our lovely service providers (Telus, Rogers, etc) charge an additional fee that US carriers do not (that was a surprise!). The monthly cost to maintain a phone number (each store needs one) is \$1.93. This means your actual cost per text over a month will lower as you increase the volume. Below is an example of monthly costs after sending 1, 2 and 5 texts every day of the month.

			0.044 per text		0.027 per text
Texts per day	Per month	CAD store monthly cost	Avg cost per text including base fee	US store monthly cost	Avg cost per text including base fee
1	30	3.25	0.108	2.74	0.091
2	60	4.57	0.076	3.55	0.059
5	150	8.53	0.057	5.98	0.040
All costs are in Canadian currency (e.g. US cost is about 25% lower)					

After looking at the volumes stores are currently using, I think the average store will send about 60 texts per month (\$4.57 for Canadians and \$3.55 for US stores - or about \$2.66US).

These amounts are not very large and so to make it as simple as possible we are going to charge each store a base of \$50 which will then be depleted each month based on your actual usage. Periodically, you will then need to top up the credit

by adding another \$50. For example, if you only maintained the phone number (sent no texts) the \$50 would last for 26 months. At 60 texts per month the \$50 will last 11 months in Canada and 14 months in the US.

There are factors that will impact this estimate such as increasing the size of your messages, or encouraging incoming messages (replies are usually one segment or around 2 cents to receive), or the Canadian exchange rate changes, or Twilio changes their prices.

Closing a store's Texting/Twilio subaccount

If a store decides that they no longer want to use the texting feature, follow these steps:

- 1) **Confirm** that store no longer wants to use the texting feature (**Important** - If we are cancelling due to no activity on the account, please confirm with the store before canceling)
- 2) On the TBM admin site, search up the store and under the Webstore section you will see the Twilio area where you can suspend or cancel an account.
 - a. **Suspend the Twilio Account**– The store will not be able to use the texting feature; however, they will still have an active phone number and be charged \$1.00 per month.
 - b. **Delete the Twilio Account** – The store will not be able to use the texting feature AND the phone number/Twilio sub account will be requested for deletion.

Please note the following from the Twilio site on cancelling a sub account:

If you're managing multiple customers via subaccounts, you can change the subaccount status to "closed" to irreversibly close it. If a subaccount is closed, it means that:

- *Twilio will release all phone numbers assigned to it.*
- *You never be able to use this subaccount to make and receive phone calls or send and receive SMS messages again.*
- *It cannot be opened again.*
- *It will be shown as "closed" in your management dashboard when you log in to <https://www.twilio.com/user/account>*
- *It will appear in your Accounts List via the API, and you will still have access to historical data for that subaccount unless automatic deletion of closed subaccounts is enabled. If you have enabled automatic deletion of closed subaccounts through the Console Subaccounts settings page, we will delete all subaccount data 30 days after closure. This includes previously closed subaccounts, which will no longer appear on the Console.*
 - *Twilio has automatically enabled this setting for all new projects created after July 5, 2018, as well as all projects without any subaccounts.*
 - *For all other projects, project owners can turn this setting on through the Console Subaccounts settings page.*

Note: *If you want to temporarily suspend one of your subaccounts, you can change its status to "suspended" instead of "closed."*

Very Rare: To re-enabled a cancelled Twilio sub account:

If the sub account is still within the 30-day deletion window you should be able to reach out to Twilio to re enable the sub account. Log into the Bookmanager Twilio account and look up the status of the sub account under USAGE –

SUBACCOUNTS area. Filter the search by closed accounts and find the store. You should see on the right side if it is pending deletion. If it is, reach out to Twilio support to re enable. You will need to assign a new phone number. Tobias will have to manually edit the code to assign a new phone number. We went through this process for the PLAY account.