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Overview

Introduction

Tixt is an SMS Integration that extends your ConnectWise Manage functionality allowing your clients to submit support requests via text message (SMS). When an incoming text is received, Tixt will create a new Ticket in Manage allowing your technician(s) and client(s) to communicate between SMS and the ticket notes.

Configuration

System Requirements

To utilize Tixt fully, the following criteria must be met:

- Your Manage software must be setup with login credentials that have access to the Service, Company, and System modules. See ConnectWise Manage Configuration.
- Your Manage software must be set up with login credentials that have access to the REST API. See ConnectWise Manage Configuration.
- Internet Access: An internet connection is required.

ConnectWise Manage Configuration

Before using Tixt, you must ensure that Manage is configured to allow access to the Service, Company, and System modules through the REST API.

Configuration of a ConnectWise Manage Login

When you set up Tixt, you will need to provide a Manage member's login credentials that Tixt will use to read and update Manage. **It is strongly recommended that this member be a dedicated API Member solely for use with Tixt.** This will allow Tixt to reliably process Manage callbacks and determine whether the callback was triggered by Tixt or your technician.

Please note: If you are currently using LDAP for you Manage login, this password *will not work* due to Manage API limitations. To access the API through Tixt, you will need to setup a secondary password in Manage on your My Account screen.

> If you have installed other integrations, you might have created an "Integrator Login". Note that the Accounting System in Manage works a bit differently, and as such, does not use an "Integrator Login". The Login must be a normal Manage member.

For the Member to be able to work with the required information, they must be assigned a security role that allows access to the relevant Interfaces. With a default installation, the "Role ID" field must be set to either "Executive" or "Admin".

If, instead, you wish to create your own role rather than use the Manage defaults, you need to ensure that the security role level settings for the "Service Desk", "Companies", and "System" modules are set to "All" for all levels, as depicted below:

Configuration of ConnectWise Manage to access the REST API

In addition to accessing the Manage modules listed above, Txt also requires credentials to access the REST API. There are two options for providing credentials to access the REST API: APIKey and MemberImpersonation

Option 1: APIKey Authentication

To setup APIKey Authentication in Manage, navigate to the "API Keys" tab on the member setup. Enter a description and click Save to generate a Public/Private key-pair. You may want to save the Private Key somewhere as **it will not be visible again once you close the API Keys screen.**
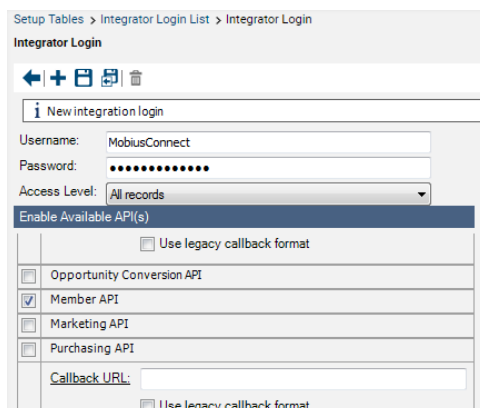
Option 2: MemberImpersonation Authentication

To setup MemberImpersonation Authentication in Manage, open the Integrator Login setup table by navigating to *System > Setup Tables* and searching for "Integrator Login". Click to create a new Integrator Login. Provide a Username and Password. Select "All records" for Access Level, and click to enable the "Member API"

Tixt: An SMS Integration

Tixt is a web service that extends ConnectWise Manage allowing your customers to submit and communicate with support requests via text message. Text messages sent by your customer will be appended to the ticket notes. Notes added to the ticket by your technician will be sent to your customer via text message.

You can access Tixt at: https://tixt.mobiusworks.com

Account Creation

You can sign up for a free trial by selecting "Sign Up" in the navigational sidebar.

On the signup page, you will need to enter the following information:

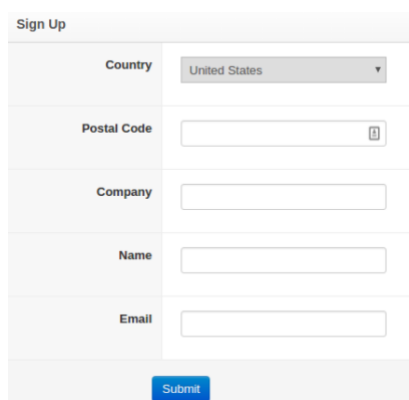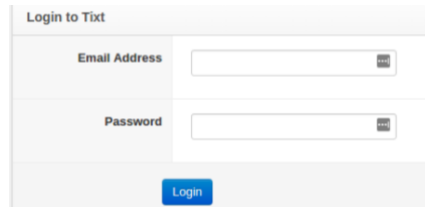1. **Country** – We will use this value to generate a Support Request Ticket creation SMS number. Current support for United States only.
2. **Postal Code** – We will use this value to generate a Support Request Ticket creation SMS number in your area.
3. **Company –** Your business company name.
4. **Name** – Your first AND last name.
5. **Email** – Your email address.

Upon successful signup, you will receive a confirmation email with a unique URL to establish your password. Once you have established your password, you should be automatically logged in. However, if login is required, then please login with your email and established password.

Logging In

Once on the Tixt site, you will be brought to the login page.
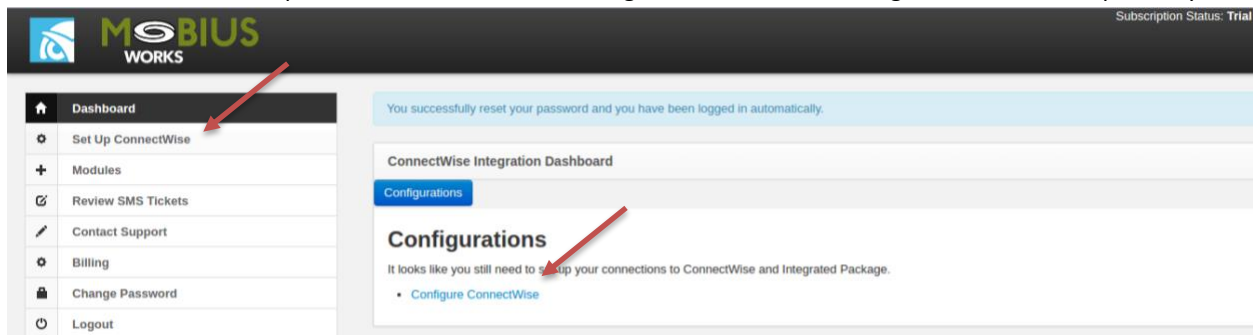
Login to Tixt	
Email Address	
Password	
	Login

Enter your Tixt account email address and password in the "Email Address" and "Password" fields respectively.

> Your Tixt account password was setup during the **Account Creation** step. If you have forgotten your password, you can select the *Forgot Password* option in the side login menu. This will bring you to a new page that will require your Tixt account email address. Once you have entered your Tixt account email address, press the *Reset Password* button. Once you have submitted your request for a password reset, you will receive an email from *no-reply@mobiusworks.com*, and inside this email will be a unique link to reset your password.

Account Setup

When logging in to Tixt for the first time, your home page will show a "Configurations" section of the user dashboard page. The first required step is to configure your Manage connection. You can click either the Configure ConnectWise or the Set Up ConnectWise link in the Configurations section or navigational sidebar respectively.
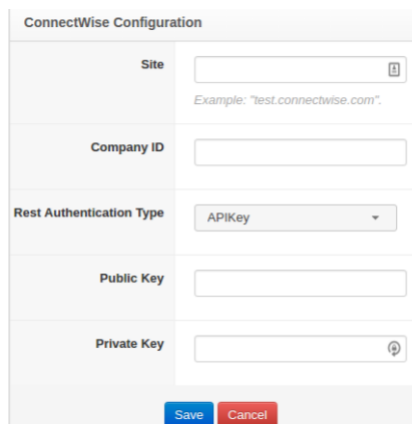
ConnectWise Manage Connection

The ConnectWise Manage Configuration page allows the setup of a single connection to your Manage company. It will require a member login with access to the required modules and proper credentials to access the REST API. See ConnectWise Manage Configuration.

To setup your Manage API connection, fill in the correct information for Site, Company ID, and Public Key and Private Key (if using APIKey authentication) or Member Name, Integrator Username, and Integrator Password (if using MemberImpersonation.)

Please note that if you change your ConnectWise Manage Connection, you will need to re-establish your Sync Configuration. Be aware that **any SMSTickets created with your previous ConnectWise connection will no longer be processed**. Updating your ConnectWise connection to the previous environment will resume processing of SMSTickets created with your previous ConnectWise connection.

Sync Configuration

Once the Manage Configuration has been established and validated, the option to setup your Sync Configuration becomes available in the navigational sidebar. This Sync Configuration page is used to establish default Tixt values.

1. **Service Board –** Default Service Board for where new SMS Tickets will be created.
2. **Catch All Company** – Fallback Company when Tixt fails to identify a Company or Contact for an incoming SMS number.
3. **Error Email** – If there is an unexpected issue, an error message and/or a copy of the SMS message will be sent to this email address, i.e. you will not lose messages.

Dedicated Number for SMS Ticket Creation

After successfully configuring your Manage Connection and establishing your Sync Configuration values, the Configurations Dashboard should indicate "Account Configured!" as well as list your SMS Ticket Creation Number and the identified dedicated API Member used in your ConnectWise Manage Configuration.

1. **SMS Ticket Creation Number** – *This is the phone number that you give to your clients.* Every SMS text received at this number will create a new Service Ticket on the Service Board that you set in your Sync Configuration. Tixt will also provide a response to the sender from another SMS number confirming creation of the ticket and providing a new thread in which the SMS conversation can continue.
2. **Dedicated API Member** – This is the Manage member that Tixt will impersonate. *It should be considered a dedicated API member. This means any updates triggered by this member in Manage will be ignored by Tixt.*

Synchronization Workflow

When the previous steps in this document have been followed, Tixt should be ready to start processing Tixt messages! The diagram below illustrates the Tixt workflow:
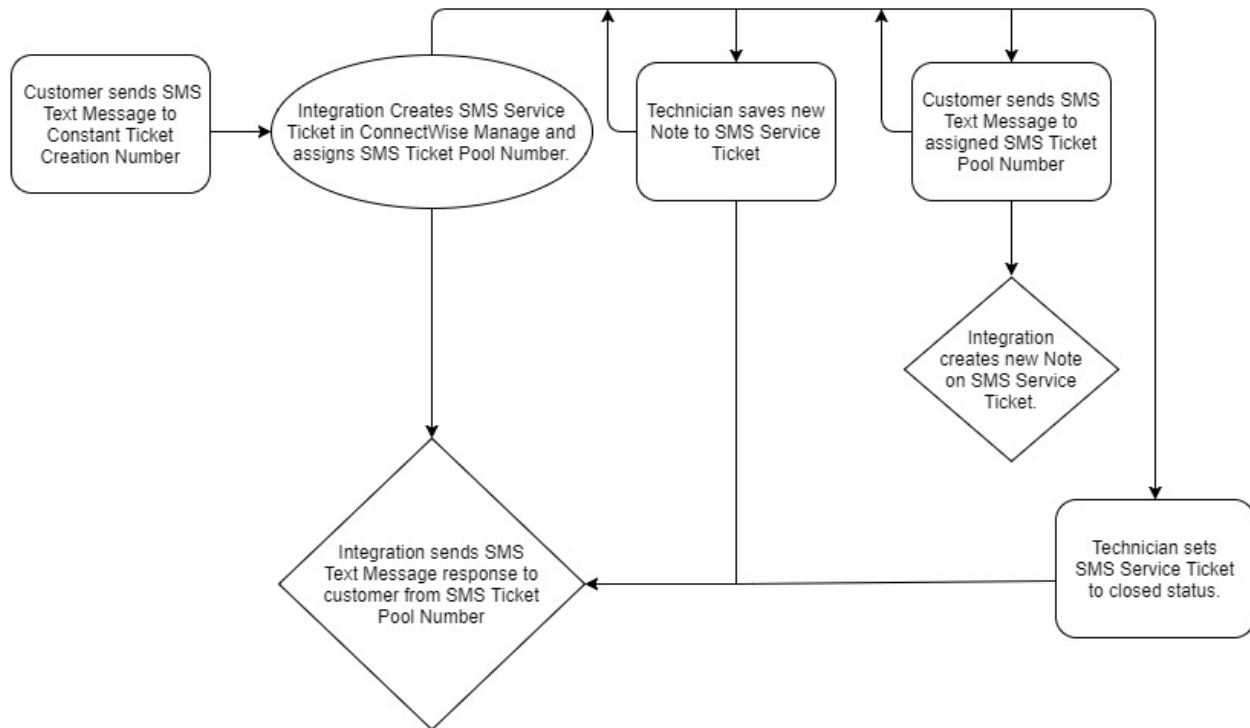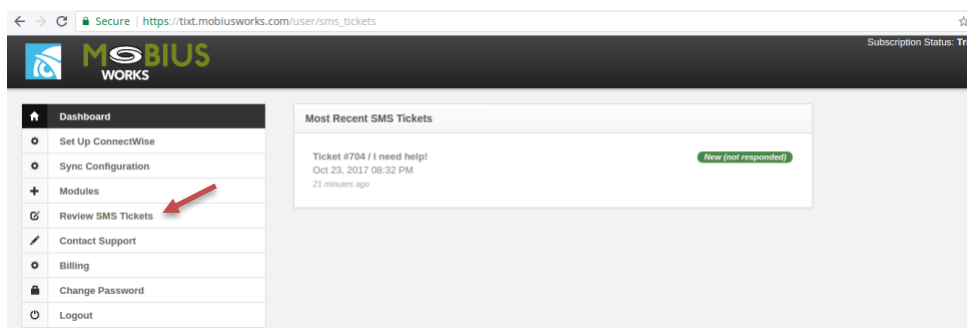

Creating a Ticket

Once your Tixt account has been configured, you can test the service simply by sending a SMS text message to the SMS Ticket Creation Number displayed on your Tixt dashboard. Every SMS text received at this number will create a new Service Ticket on the Service Board that you set in your Sync Configuration. **However, the following should be noted**:

1. There are a limited number of Ticket Pool Numbers available to your account.
   a. It's possible that a single customer (using the same SMS FROM number) could exceed this limit by continuously Tixting your Dedicated SMS Ticket Creation number. If this limit is exceeded, your customer will receive a response stating there are too many open SMS Tickets against their number to create a new ticket.
   b. **You must ensure that SMS Tickets are properly closed in Manage to prevent this limit from being exceeded unintentionally.**
2. Tixt will attempt to map to a company and contact using the incoming SMS from number (i.e. your customer's contact number). If no matching company or contact is found, Tixt will fall back to the Sync Configuration Catch All Company.
3. All newly created SMS Tickets will be created on the Sync Configuration service board. You can safely move the SMS Ticket to another board if necessary and the conversation will still be appended to the ticket notes.

When the ticket is created in Manage, the customer will automatically receive a confirmation text message stating that the request has been received and informing them of the ticket number. *Please note that this confirmation text will come from a different phone number. That new number is the unique identifier of the conversation.* Since text messages don't have a subject line, we aren't able to put the ticket number in a subject. By using this new number, the conversation now has a unique key that allows us to identify the correct conversation to the corresponding ticket. As a result, **the conversation must continue in this new thread to communicate with the ticket.**

SMS Tickets created by Tixt can also be reviewed under the Review SMS Tickets link in the navigational sidebar.

Clicking on a Recent SMS Ticket will drill into the ticket displaying status and details:

Please note that our SMS provider reserves specific keywords to allow users to control their communication preferences. For example, if a partner sends just the word "HELP" to your dedicated Ticket Creation Number, the provider will not allow a ticket to be created. Likewise, if the user sends just the word "STOP", then they will no longer receive future SMS messages. For a full list of these keywords, please click here.

Respond to a Request

Once a SMS Ticket has been successfully created in Manage, Tixt will "listen" for SMSTicket Updates until the ticket has been closed in Manage. While the ticket is open, SMS text messages sent by your customer will be appended to the Manage ticket as notes, and notes added to the ticket from within Manage by your technician(s) will be sent to the customer as SMS text messages.

To respond to a support request over Tixt, navigate to the service ticket in Manage, find the Notes pod, and click the Add Note button to create a new note on the ticket. When the note is saved, it will be captured by Tixt and sent to your customer via SMS text message.
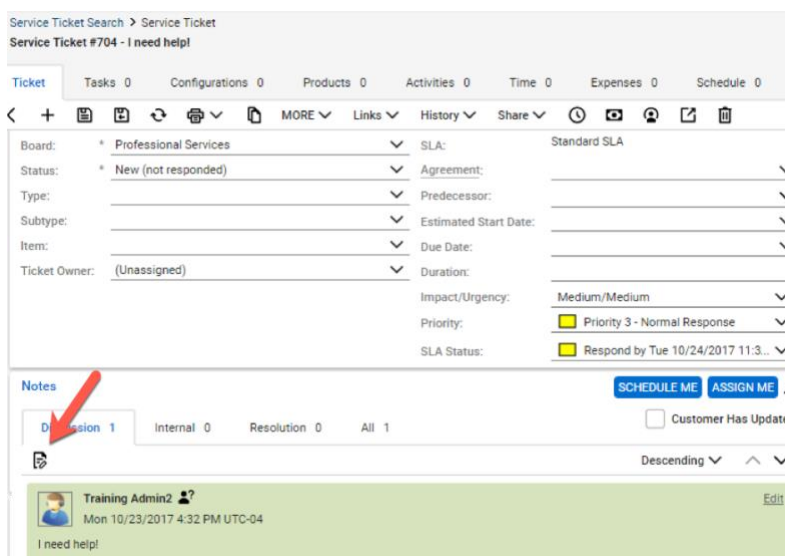
When Tixt receives either a new note saved on the ticket or a new text message from your customer, that processed activity can be observed in the Tixt web interface under the SMS ticket status and details.

Listening for SMSTicket Updates

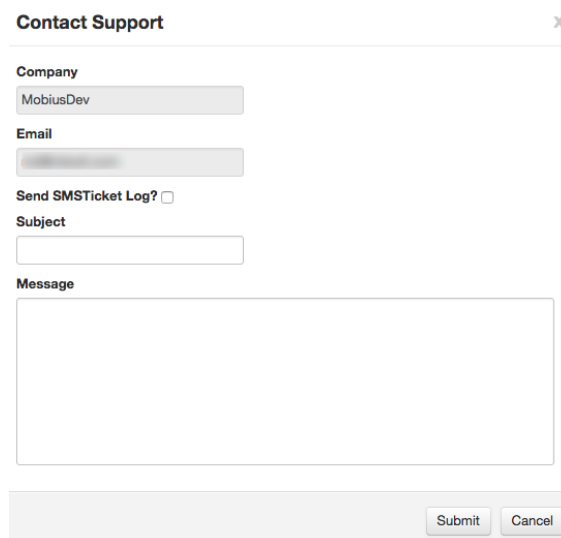| Status	Action	Message
Completed Successfully	Receiving update from SMSTicket #704	
Completed Successfully	Sending SMS to +14132307360	Message: Hi! How can we help?
Completed Successfully	Receiving SMS from +14132307360	
Completed Successfully	Updating Notes for SMSTicket #704	Message: My computer won't turn on!
Completed Successfully	Receiving update from SMSTicket #704	
Completed Successfully	Sending SMS to +14132307360	Message: Is the power cord plugged in?
Completed Successfully	Receiving SMS from +14132307360	
Completed Successfully	Updating Notes for SMSTicket #704	Message: That was it. Thanks! You can close this ticket
Completed Successfully	Receiving update from SMSTicket #704	
Completed Successfully	Sending SMS to +14132307360	Message: Ticket #704 has been closed. If you need additional support, Tixt +14137293165 to start a new support request.

Note: When the SMSTicket is set to a closed status, a text message will be automatically sent to the customer notifying that the ticket has been closed and informing how to start a new ticket.

> Please note that Ticket Notes generated by the Email Connector will **not** be sent to the client over SMS.

Contact Us

Support

If you have any questions, there is a Contact Support link in the navigational sidebar. You can use this form to easily submit support requests. If the support request is related to an issue with a specific SMSTicket log, then you can select to attach the log by selecting the "Send SMSTicket Log?" checkbox and selecting the ticket.

Provide a Subject and Message, and click Submit to send the Support Request. Then, someone from our support team will reach out to you.

Feedback

We always want to hear from our users! We want this integration to work best for YOU; so, please feel free to contact us with any questions or feedback.