



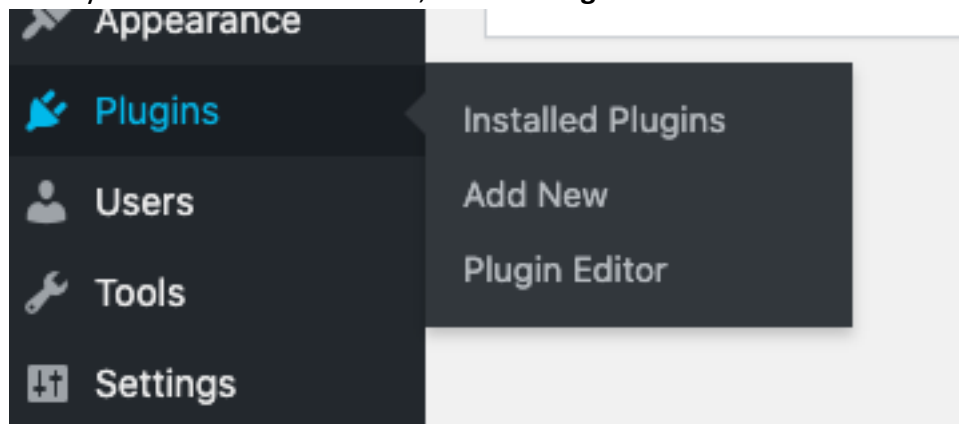
Plugin Manual

Sept 2020 v0.2

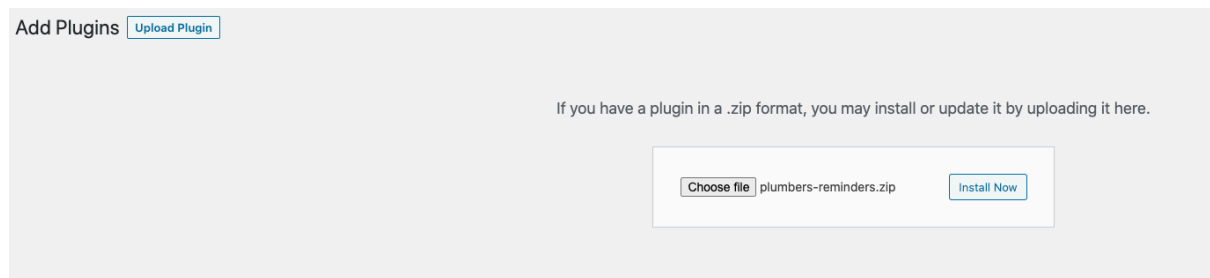
Installing the plugin

Go to your website admin area usually at YOURDOMAINNAME/wp-admin and login.

Once you are on the dashboard, click on **Plugins** and then **Add New**

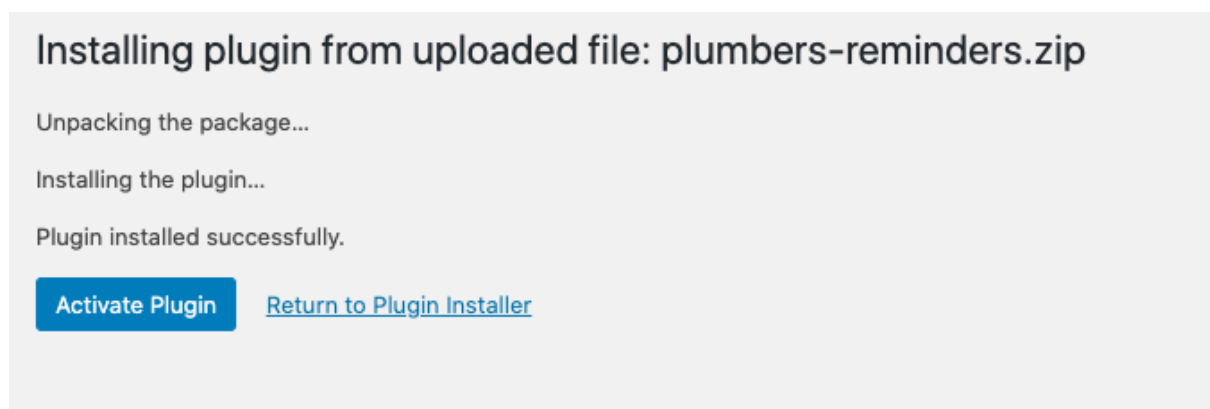


Click on the **Upload Plugin** button



Choose file and browse to where you downloaded the plugin zip file plumbers-reminders.zip

Click on **Install Now**. Finally click on **Activate plugin**



The Plumbers Reminders plugin is now installed and activated and nearly ready for use.

Backend or frontend?

Adding and editing customers can be done in the front end (public pages) or back end (admin area).

If you are setting up a site for a client who is not particularly WordPress savvy use the shortcode [plumber_reminders] on a page and give them a subscriber level login.

Back end functionality requires “edit posts” capability – so an Editor role.

Settings

On the settings screen you can add your company details and set up the messages.

Plumber Reminders Settings

Company Name

Address1

Address2

City

County

Postcode

Mobile

Email

Sms Message
138 characters used
[title] [first_name] [last_name] your annual boiler service is due on [date]. Please do get in touch to book a service, Regards Andy Moyle

Email Message
184 characters used
[title] [first_name] [last_name] your annual boiler service is due on [date].
Please do get in touch to book a service by replying or calling me on 07905 913291,
Kind Regards,
Andy

Sms Week After
161 characters used
[title] [first_name] [last_name] your annual boiler service was due on [date], please do book a service with me to keep your appliance running safely, Andy Moyle

Sms Username

Sms Api Key

Sms Sender

Country Code
44

Save

Message settings

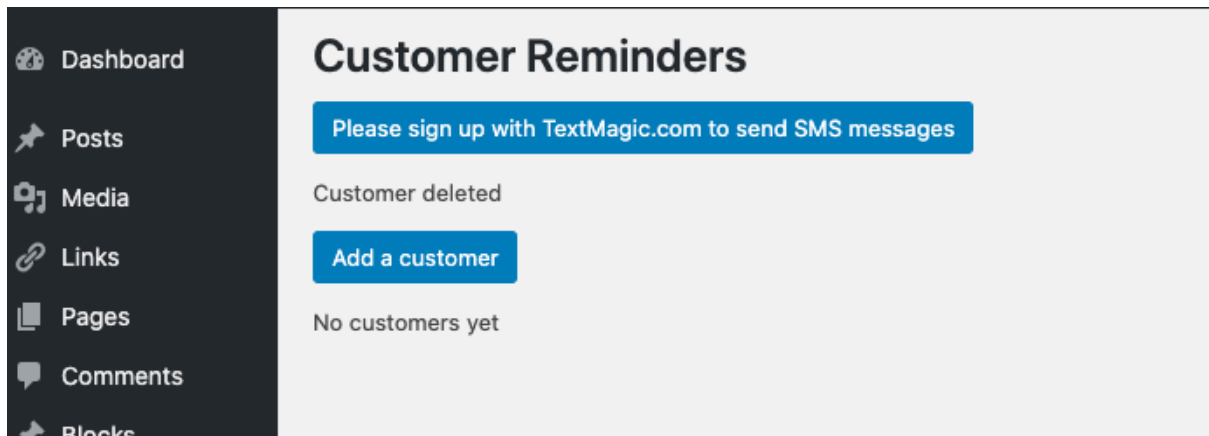
When you set up the SMS and email messages, there are “shortcodes” you can use to personalise your messages to each customer. They are...

[title], [first_name], [last_name],[address], [due_date]

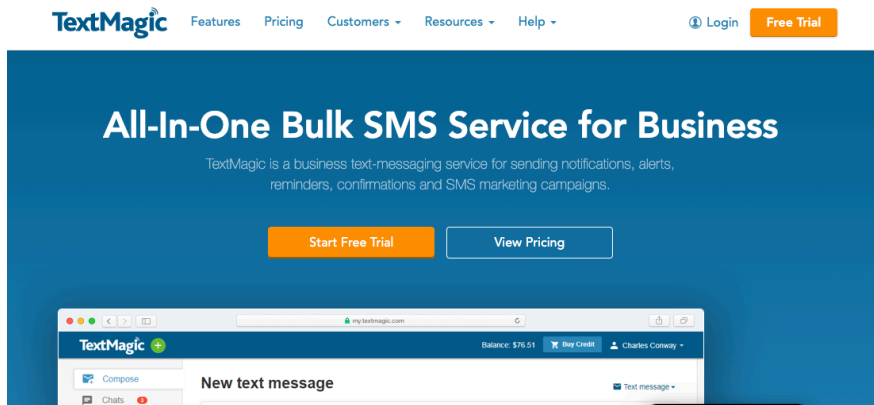
Hopefully they are all self-explanatory!

Setting up SMS sending

The plumbers reminders plugin uses TextMagic as its SMS provider. Please use the link on the main Plumbers Reminders page to sign up with TextMagic.com



On the first screen click either orange Free Trial button



Go through the signup and confirm your email.

The next stage is to “Choose SMS sender settings for your account”

If you don't see the screen below, click on Setup Wizard at the top!

Then click on the middle box “Your Own Mobile” – this will set it up so the SMS look like they are coming from your mobile number so you will get the replies. You will need to confirm your cell number with a code they send you.

Choose SMS Sender Settings for Your Account

Receive incoming SMS via TextMagic or your own mobile phone.

RECOMMENDED



DEFAULT SETTINGS

Display our SMS virtual number as a sender.

Get replies via TextMagic account, email or API.

Select



YOUR OWN MOBILE

Display your own mobile number as a sender.

Replies will go directly to your mobile phone.

Select



SMS SENDER ID

Display your company name as a sender.

People will not be able to reply to your texts.

Select

Not ready to choose your SMS sender settings? [Skip this page.](#)

The last stage is to get an API key to use in the Plumbers Reminders plugin. It's the first option under "API & Integrations" on the right hand side "Create an API key"

What would you like to do next?

Simply click on the feature you would like to try out first or [skip this page](#). You can return to this page later.

Watch tutorial



WEB APP

- Send a text message
- Start an online SMS chat
- Import your contacts
- Schedule a message
- Lookup a number

Watch tutorial



EMAIL TO SMS

- Send SMS from your email
- Authorize email addresses
- Create a distribution list
- View Email to SMS settings
- Setup Email to SMS API

Watch tutorial



MANAGE ACCOUNT

- Invite team members
- Buy SMS credit
- Set up Single Sign-On
- Manage notifications
- Download apps

Watch tutorial



API & INTEGRATIONS

- Create an API key
- Read API documentation
- Set up callback URLs
- Try API Sandbox
- View Zapier integrations

Not sure what to do next? [Ask us a question](#) or [skip this page](#).

On the next screen click on “Add new API key”

TextMagic + Balance: £0.400 Buy Credit Andy Moyle

API [Watch tutorial](#)

Please read the [API Documentation](#) to learn more about TextMagic API.

API v2 Keys API v2 Settings Integrations Verify (NEW) API v1 (legacy)

These keys are valid only for the new TextMagic REST API v2. To generate a key for API v1, please proceed to [API v1 Settings](#) page.

[Add new API key](#) [Flush API Keys cache](#)

Get started by adding a new API key

In order to integrate our SMS gateway with your app please create a new API key.

Give it a name and click “Generate new key”

You can then copy it on to your clipboard by clicking on it.

Now you can go back to the Plumbers Reminders>Settings page and add your username and API key.

Add your mobile number and the country code which in the UK is 44. Finally click Save.

Sms Username

Sms Api Key

Sms Sender
07905913291

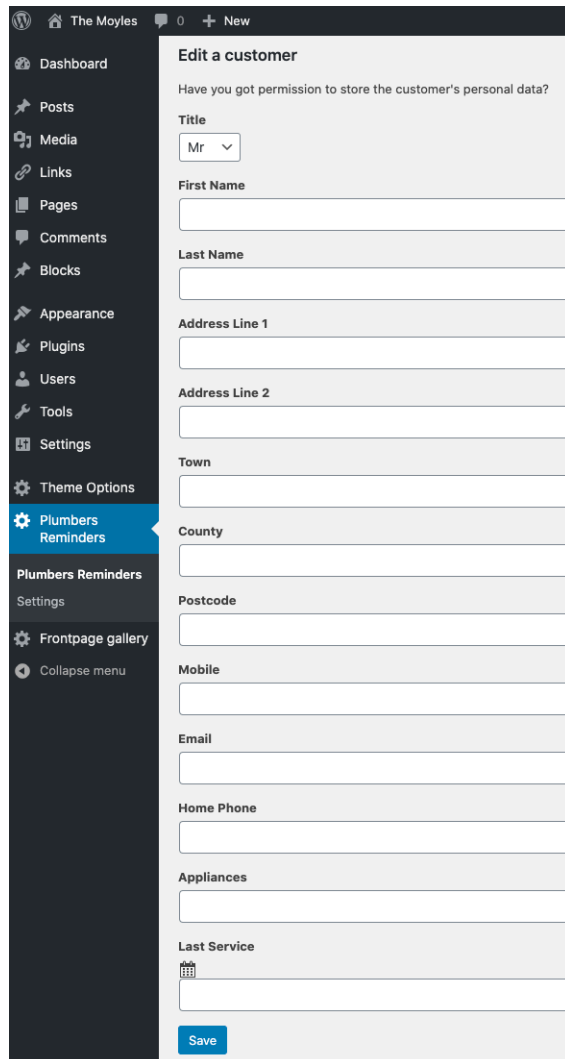
Country Code
44

Save

Adding and editing customers

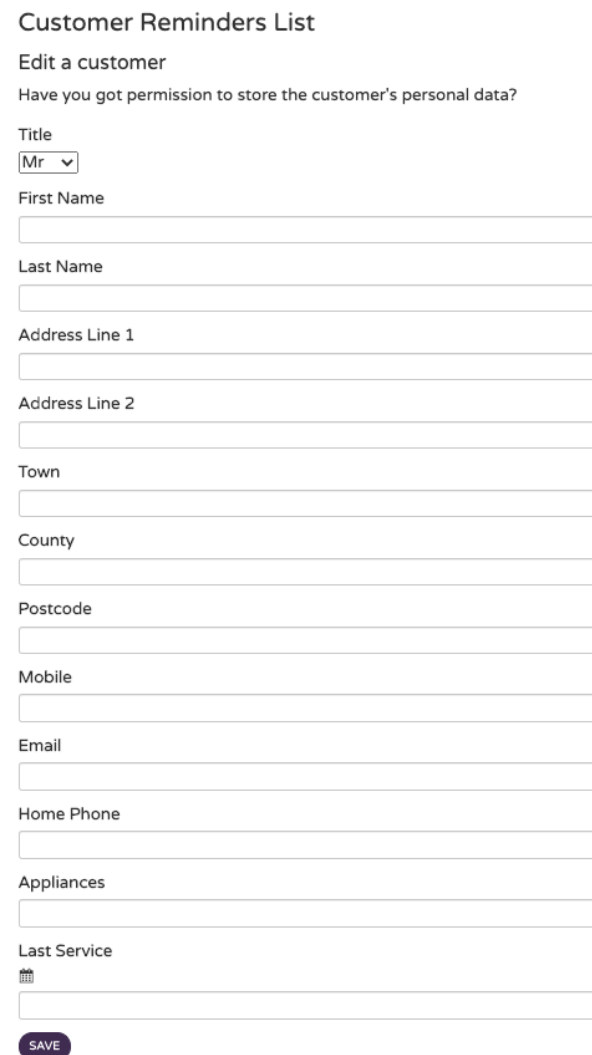
Adding and editing customers is simple. The forms have the same fields, but will look slightly different depending on whether you are doing it on the website front end or admin area.

Back End Form



The screenshot shows the WordPress admin interface. On the left is a dark sidebar menu with options like Dashboard, Posts, Media, Links, Pages, Comments, Blocks, Appearance, Plugins, Users, Tools, Settings, Theme Options, Plumbers Reminders (highlighted), Plumbers Reminders Settings, Frontpage gallery, and Collapse menu. The main content area is titled 'Edit a customer' and includes a permission check: 'Have you got permission to store the customer's personal data?'. Below this are several form fields: Title (dropdown menu with 'Mr' selected), First Name, Last Name, Address Line 1, Address Line 2, Town, County, Postcode, Mobile, Email, Home Phone, Appliances, and Last Service (with a calendar icon). A blue 'Save' button is at the bottom.

Front end form



The screenshot shows the website front-end. The page title is 'Customer Reminders List'. Below it is a heading 'Edit a customer' and a permission check: 'Have you got permission to store the customer's personal data?'. The form fields are identical to the back-end form: Title (dropdown menu with 'Mr' selected), First Name, Last Name, Address Line 1, Address Line 2, Town, County, Postcode, Mobile, Email, Home Phone, Appliances, and Last Service (with a calendar icon). A purple 'SAVE' button is at the bottom.

The fields again should be self-explanatory

Enter the mobile as with no spaces, brackets or hyphens e.g. 0789123456

Click **Save** to save the customer.

Once you have some customers entered, they are displayed as a list

SEARCH
ADD A CUSTOMER
 1 customer details stored

Edit	Delete	Last Service	Name	Address	Email	Mobile
EDIT	DELETE	18th December 2018 SERVICED TODAY SERVICE BOOKED	Andy Moyle	[REDACTED]	clients@themoyles.co.uk	[REDACTED]
Edit	Delete	Last Service	Name	Address	Email	Mobile

Click on "SERVICED TODAY" when you have serviced their boiler and SERVICE BOOKED when they have booked to stop further reminders being sent!

Timing of Reminders

Reminders will be sent out 28 days before, 14days before and a week after a boiler service is due if you haven't clicked "service Booked" or "Serviced today" for that customer.

They are scheduled to go out automatically at 9am. But because of the way WordPress works, they will go out with the first website visit after 9am. On a low use website, that could be a long time later.

The best get around that is to set up a CRON job on your server. If you don't know how to do that, ask your web-designer or hosting company to do it for you.

The command you will need them to setup is this...

```
0 9 * * * /usr/bin/curl http://YOUR_DOMAIN_NAME/index.php
```