

Setting Up Text Messaging (Admin)

In this article:

- [Ways to Opt In](#)
- [Setting Up Keywords](#)
- [Resident Experience: Opting In to Text Messages Using ResidentPortal](#)
- [Scheduling Text Messages](#)

By setting up text message functionality, you allow leads and residents to opt in to all kinds of useful text notifications about rent, maintenance, events, and even packages. Leads and residents will be more connected to each property's community without having to visit the office.

Two-way texting using is also currently available. To set up two-way texting, see the [Notification Panel User Guide](#) .

Ways to Opt In

In order to text leads or residents, they must have already opted in to text messaging. The following lists show all the different ways leads and residents can opt in to receiving texts from your property.

Leads

- **Multi Contact Button:** When leads text your property using ProspectPortal's multi contact button, they are opted in automatically. For help setting up the multi contact button, see the article [Setting Up the Multi Contact Button for ProspectPortal \(Admin\)](#) .
- **Keywords:** Once an admin user sets up keywords, leads can text a keyword to 51378 to opt in to texting. For help setting up keywords, see the section in this article called [Setting Up Keywords](#).
- **Guest Card / Application:** Both the online guest card and the online application can have fields that allow leads to opt in.

Residents

- **ResidentPortal:** Residents can opt in by going to ResidentPortal and choosing to receive texts for community announcements. For more information, see the section in this article called [Resident Experience: Opting In to Text Messages Using ResidentPortal](#).
- **Keywords:** Once an admin user sets up keywords, residents can text a keyword to 51378 to opt in texting. For help setting up keywords, see the section in this article called [Setting Up Keywords](#).

 The only keywords that opt residents in to texting are those for community announcements and "all resident communication."

Associated Products:
Message Center™

-  Even after you've begun a text conversation, leads and residents can opt out at any time by texting STOP.

Setting Up Keywords

After you set up keywords in Entrata, leads and residents can text keywords to the number 51378 in order to opt in to different kinds of text messages. To set up keywords, do the following:

1. In Entrata, go to Setup >> Properties >> [select a property] >> Communication >> General >> Text Messaging.
2. In the Text Keywords section, click  **Edit Keywords**.
3. Click  **Add a New Keyword**. This opens the Add a New Keyword window.
4. In the Add a New Keyword window, type a word into the **Keyword** field.

 Click on the tool tips  for more information about each field.

5. Select a **Message Type**.
6. Enter a **Matched Response Message** and an **Unmatched Response Message**.
7. Click **Save**. Your new keyword appears in the Text Keywords section.

Resident Experience: Opting In to Text Messages Using ResidentPortal

Residents can opt in to text messages by texting the keywords you've set up, but they can also opt in to certain text messages by using ResidentPortal.

1. The resident logs in to ResidentPortal.
2. On the left side of the screen under Priority Alerts, the resident clicks **Receive SMS Notifications**. This takes the resident to the Contact tab of the My Account screen.
3. Under the Text Messaging Preferences section, the resident selects or deselects checkboxes to indicate which notifications they would like to receive.

 Make your keywords known to property staff so they can give the keywords to leads and residents.

 When a new lead texts the property, a Lead Profile is created under the lead's phone number.

 Functionality might differ based on your selected website template.

Text Messaging Preferences

- **Community Announcements:** This allows residents to receive any texts you send from Entrata.
- **Maintenance Updates:** This allows residents to receive automatic maintenance updates.
- **Package Notification:** This allows residents to receive package notifications when packages are entered in Entrata.

4. If no mobile number has been saved, the resident is prompted to provide a **Mobile Number**. The resident then clicks **Save Mobile Number**.
5. When finished, the resident must click the **Terms & Conditions** checkbox and then click **Save Changes**.

Scheduling Text Messages

You can schedule texts to be sent out to leads and residents who have opted in to text messaging.

Before you begin:

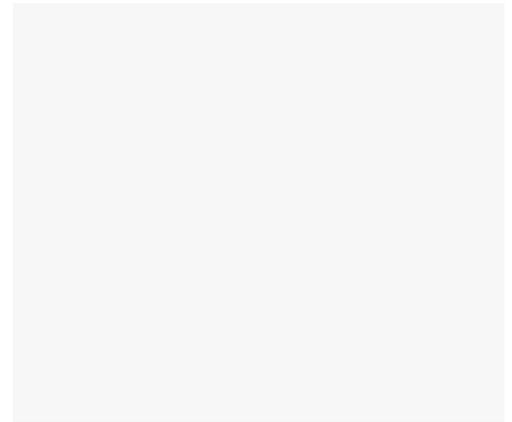
- Make sure leads and residents have mobile numbers entered in the Lead or Resident Profile. The number in the **Home Number** field can *not* be texted.
- Leads and residents must opt in to text messaging.

1. In Entrata, go to Setup >> Properties >> [select a property] >> Communication >> General >> Text Messaging.
2. In the Text Messages section, click  **Edit Messages**.
3. Click  **Add a New Message**.
4. When the Add New Message window appears, enter the desired text message in the **Response Message** textbox.
5. Choose a **Delivery Date**.
6. Select a **Delivery Time**.
7. Choose a **Subscription List**. Subscription lists determine who receives the text message.

Subscription Lists

- Selecting **Lead Communication** sends your text to all leads who have opted in to texting.
- Selecting **Resident Communication** sends your text to residents who have opted in to receive texts about community announcements or "all resident communication."

8. Click **Save Message**. Your text message appears in the Text Messages section.



Sending Text Messages

In this article:

- [Ways to Opt In](#)
- [Sending Text Messages to Residents](#)
- [Sending Text Messages to Leads](#)

By using text messaging, leads and residents can stay more connected to your property's community without having to visit your office.

Two-way texting is also currently available. For more information, see the [Notification Panel User Guide](#).

Ways to Opt In

In order to text leads or residents, they must have already opted in to text messaging. The following lists show all the different ways leads and residents can opt in to receiving texts from your property.

Leads

- **Multi Contact Button:** When leads text your property using ProspectPortal's multi contact button, they are opted in automatically.
- **Keywords:** Once an admin user sets up text keywords, leads can text a keyword to 51378 to opt in to texting.
- **Guest Card / Application:** Both the online guest card and the online application can have fields that allow leads to opt in.

Residents

- **ResidentPortal:** Residents can opt in by going to ResidentPortal and choosing to receive texts for community announcements.
- **Keywords:** Once an admin user sets up text keywords, residents can text a keyword to 51378 to opt in texting.

 The only text keywords that opt residents in to texting are those for community announcements and "all resident communication."

Associated Products:
Message Center™

-  Even after you've begun a text conversation, leads and residents can opt out at any time by texting STOP.

Sending Text Messages to Residents

Before you begin:

- Make sure residents have mobile numbers entered in the Resident Profile. The number in the **Home Number** field can *not* be texted.
- An admin user must set up either ResidentPortal or keywords for your property.
- The resident must opt in to texting.

1. In Entrata, go to Residents >> All Residents.
2. Click the checkbox next to any resident you would like to text.

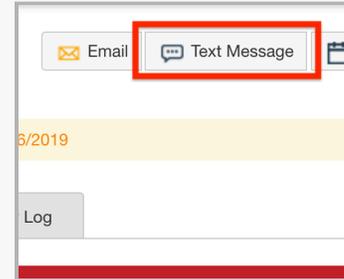
	RESIDENTS	STA
<input type="checkbox"/>	Aade, Kailash (910) 580-9586 1755518623kailash16321086demo@demo	Cur Mo
<input type="checkbox"/>	Acharya, Kiran (980) 307-0490 1031229481kiran16179397demo@demoxx	Cur Mo
<input type="checkbox"/>	Acton-Ross, LuAnne lacton@jmgrealty.com	Cur Mo
<input type="checkbox"/>	Adams, Kim (333) 444-5533 kadams@entrata.lcl	Cur Mo

3. Click the drop-down arrow above the Residents column, and then select **Text** from the available options. This opens the Create Text Message window.

	RESIDENTS	STA
<input checked="" type="checkbox"/>	Aade, Kailash (910) 580-9586 1755518623kailash16321086demo@demo	Cur Mo
<input checked="" type="checkbox"/>	Acharya, Kiran (980) 307-0490 1031229481kiran16179397demo@demoxx	Cur Mo
<input type="checkbox"/>	Acton-Ross, LuAnne lacton@jmgrealty.com	Cur Mo
<input type="checkbox"/>	Adams, Kim (333) 444-5533 kadams@entrata.lcl	Cur Mo

4. Enter a Message.

i You can also text residents from the Resident Profile. After residents opt in to texting, the **Text Message** button appears at the top of the profile.



i If any of the selected residents don't have a cell phone number on file or haven't opted in to text messaging, you see a red notification that tells you how many users won't receive the message.

Click **View Details** for more information.

5. Click **Send** to immediately text the selected residents.

Sending Text Messages to Leads

Before you begin:

- Make sure leads have mobile numbers entered in the Lead Profile. The number in the **Home Number** field can *not* be texted.
- The lead must opt in to texting.

1. Go to Leads >> All Leads.

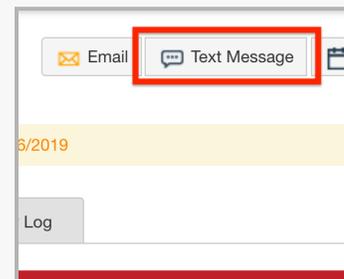
i If the Applicants tab has been separated out from the Leads tab, go to Applicants >> All Applicants when texting applicants.

2. Click the checkbox next to any lead you would like to text.

LEAD	STATUS
<input checked="" type="checkbox"/> Delacruz, Hector hdelacruz@email.jmp	Application: Starter Step: Summary
<input type="checkbox"/> Johnson, Mark TheMarkPlace@gmail.lcl	Application: Starter Step: Unit Info
<input type="checkbox"/> Atwell, Sheri satwell@gmail.jmp	Application: Starter Step: Payment
<input type="checkbox"/> Smith, Becky beckysmith@email.ele	Guest Card: Compl

3. Click the drop-down arrow above the Lead column, and then select

i You can also text leads from the Lead Profile. After leads opt in to texting, the **Text Message** button appears at the top of the profile.



 Text from the available options. This opens the Create Text Message window.

LEAD	STATUS
<input checked="" type="checkbox"/> Delacruz, Hector hdelacruz@email.jmp	Application: Started Step: Summary
<input type="checkbox"/> Johnson, Mark TheMarkPlace@gmail.lcl	Application: Started Step: Unit Info
<input checked="" type="checkbox"/> Atwell, Sheri satwell@gmail.jmp	Application: Started Step: Payment
<input type="checkbox"/> Smith, Becky beckysmith@email.ele	Guest Card: Compl

4. Enter a Message.

 If any of the selected leads don't have a cell phone number on file or haven't opted in to text messaging, you see a red notification that tells you how many users won't receive the message.

Click [View Details](#) for more information.

5. Click Send to immediately text the selected leads.

Scheduling Custom and Emergency Calls (Admin)

In this article:

- [Scheduling a Call](#)
- [Adding Audio Dialogue](#)

Entrata's Scheduled Calls functionality allows you to send messages via automated voice messages that you can customize.

Scheduling a Call

In this section:

- [Custom Calls](#)
- [Emergency Calls](#)
- [Recommended Next Steps](#)

Custom Calls

1. In Entrata, go to Setup >> Company >> Residents >> Scheduled Calls.
2. Click  **Add Scheduled Call**. This opens the Add Scheduled Call window.
3. Assign your call a **Name**.
4. Click on the **Call Type** drop-down and select **Custom**.
5. Select 1 or more of the **Resident Statuses** checkboxes to specify who should receive the scheduled call.
6. Select a **Frequency** of either **Once** or **Recurring**.
7. In the **Call On** field, use the calendar icon to select a date or date range.



- If **Frequency** is **Once**, selected residents will be called once on the specified **Call On** date.
- If **Frequency** is **Recurring**, the scheduled call will remain active until the end of the specified date range in the **Call On** field.

8. In the **Call Between** field, select a time range when you want the call to be made. There must be at least 4 hours between the start and end time, and the call must be made between 10am and 5pm.

Associated Products:
Message Center™

 Edit a scheduled call by clicking on the edit icon  in-line with a scheduled call.

9. If you chose a **Recurring** frequency, choose 1 of 2 options from the **Send** field: **Weekly** or **Monthly**.



- **Weekly:** Select one or more days of the week. Residents will receive a call each week on the days specified.

- **Monthly:** Select one or more days of the month. Residents will receive a call each month on the days specified.

10. If you want the recipients of your call to be able to add themselves to a do-not-call list, toggle **Allow recipients to add themselves to a do-not-call list** to **Yes**.
11. Leave the **Restrict calls to only be made on scheduled date** option set to **No** so that the resident will be called again in case a system failure occurs when the resident is called.
12. Under **Properties**, select the checkboxes of all the properties that you want to opt in to the scheduled call.
13. Click **Save**.

Emergency Calls

When an emergency happens at 1 or more properties, you can schedule an emergency call to be sent to residents, no matter the time of the day.

1. In Entrata, go to Setup >> Company >> Residents >> Scheduled Calls.
2. Click  **Add Scheduled Call**. This opens the Add Scheduled Call window.
3. Assign your call a **Name**.
4. Click on the **Call Type** drop-down and select **Emergency**.
5. Click 1 or more of the **Resident Statuses** checkboxes to specify who should receive the scheduled call.
6. In the **Call On** field, use the calendar icon to select a date.
7. In the **Call Between** field, select a time range when you want the call to be made.
8. Under **Properties**, select the checkboxes of all the properties that

 Edit a scheduled call by clicking on the edit icon  in-line with a scheduled call.

you want to opt in to the scheduled call.

9. Click **Save**.

Recommended Next Steps

Edit Video Dialogue

After saving a scheduled call, you need to add audio dialogue and perform a test call to make sure you like how the call sounds.

 For help editing video dialogue, see the next section in this article:
[Editing Video Dialogue](#).

Adding Audio Dialogue

After scheduling a call, you need to customize the message that you want your residents to hear.

Before you begin:

- You must schedule a call before you can add audio dialogue. For help scheduling calls, see the first section in this article: [Scheduling a Call](#).

1. In Entrata, go to Setup >> Company >> Residents >> Scheduled Calls.
2. Click anywhere in-line with a scheduled call to open the Edit Scheduled Call window.

3. In the Edit Scheduled Call window, click **Edit Audio Dialogue**. This opens the Edit Audio Dialogue window.

4. In the Edit Audio Dialogue window, click **Add**.
5. Type a message in the **Call Message** textbox or click the **Upload Audio File** link to upload a WAV file.

Using Merge Fields

If you type a message in the textbox, click the **Insert Merge Fields** drop-down for a list of merge fields that you can insert into your message. When the message is sent, the merge fields populate with personalized data from Entrata.

 Click  **Manage Blocked Numbers** at the top of the Scheduled Calls section to view the numbers added to the do-not-call list.

So for example, if you start your message with "Hello << RESIDENT_FIRST_NAME >>," each resident will hear the greeting with their own name inserted in the message.

6. Click **Save** when finished. Then close out of the Edit Audio Dialogue window.
7. In the Edit Scheduled Call window, click **Perform Test** and type in a phone number that you have access to.

8. Click **Send**. The system soon calls you and relays the customized message that you just created or uploaded.
9. When you're happy with your message, click  **Approve Call**.

 After a scheduled call is approved, the first call will be made on the date specified in the **Call On** field.