



# Integration Setup Instructions

The majority of this set up will be done within Epicor Solar Eclipse. This process is a little bit easier if you are logged into both Eclipse and Prokeep as an administrator at the same time.

**Note:** All Prokeep accounts must be upgraded to Prokeep Plus to utilize the Messaging API.

## **In Eclipse:**

Step 1) Verify you are on the updated version of the May 2022 release or later.

Step 2) Navigate to System > System Programming > Add On Products > API Maintenance > API Configurations. Select Prokeep Service. Click on the "Global Settings" Tab.

## **In Prokeep:**

Step 1) Navigate to Settings > API > Generate Application.

Step 2) Name the application "Eclipse" or something similar.

Step 3) Click "Generate Credentials."

Step 4) Copy and paste the credentials from Prokeep to the Username and Password fields in Global Settings.

Step 5) Under Branch Settings, set up the numbers that each branch will be texting from. You can ask your CSM for a list of Group Phone Numbers if you are unsure which groups use which numbers.

Step 6) Now that the trigger is enabled, you can set up Prokeep messages for any of the Activity Triggers in Eclipse by selecting "Prokeep SMS" when configuring the trigger.

Step 7) Once the trigger is set, you can customize the message by clicking SMS. If you would like Eclipse to send the message to the number tied to the order contact, Select Auto in the "To" field.

## **Note:**

All messages related to orders will be appended with the Order ID to provide context to the contact.