



Easy Message Pro

User Guide

V2.0

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Track opens	dd/mm/yyyy hh:mi e.g. 12/06/2013 15:00 (24
Unsubscribe	dd/mm e.g. 12/06
Name	hh:mi.. e.g. 10:30am
Last name	HH:mi e.g. 15:00 (24 hr clock)
First name	MMM e.g. May
User-defined 1	
User-defined 2	
User-defined 3	
User-defined 4	
User-defined 5	
Profile/Appt. short name	
Profile/Appt. location	
dd MMM e.g. 12 May	
dd MMM hh:mi.. e.g. 12 May 10:00am	
dd/mm/yyyy e.g. 12/06/2013	
DDD,MMM dd hh:mi.. e.g. Tue,Feb 10,10:30am	
DDD e.g. Tue	
dddd e.g. 1st, 2nd, 3rd etc.	
dd/mm/yyyy hh:mi.. e.g. 12/06/2013 10:00am	
dd MMM hh:mi e.g. 12 May 15:00 (24 hr clock)	

The rest of this document will acquaint you with Easy Message Pro feature set.

Calendars, appointment reminders and appointments

As an introduction to appointments, calendars and appointment reminders, let's take a look at an example appointments list view and the calendar views available.

First the appointments list view :

The screenshot shows the 'Appointments - List view' interface. At the top, there is a 'New appointment' button and a 'Future only' filter. Below these are search and filter options for Profile, Short name, Status, and Location. The main table displays a list of appointments with columns for When, Status, Mobile, EMail, and First. Callouts provide detailed instructions for each part of the interface:

- New appointment**: Points to the 'New appointment' button.
- Show future only, or all**: Points to the 'Future only' filter.
- Any selection currently displayed**: Points to the search and filter options.
- Display short name, location, status, profile selection only. Click again to cancel selection**: Points to the 'Short name' filter.
- Sort on column headers**: Points to the column headers in the table.
- Quick SMS. Send a quick SMS to this mobile**: Points to the 'Mobile' column.
- Quick email**: Points to the 'EMail' column.
- Hover to display SMS appointment reminder reply messages**: Points to the 'When' column.
- Hover to display the appointment notes**: Points to the 'Status' column.
- Last appointment reminder sent and total reminders in brackets**: Points to the 'Mobile' column.
- Quick search. In this case, display all appointments for Mike Dark**: Points to the search bar.

When	Status	Mobile	EMail	First
22 Jun, 2012 13:00	21 Jun 16:01 (2)	021708293	mark.jenks@woosh.co.nz	Gill Jones
23 Jun, 2012 09:30	22 Jun 16:01 (2)	021708293	mark@digitaldynamite.co.nz	Mark Beane
23 Jun, 2012 10:00	23 Jun 07:01 (1)	021708293		
23 Jun, 2012 14:30	22 Jun 16:01 (2)	021708293	mark@digitaldynamite.co.nz	Miles Cochrane
24 Jun, 2012 13:00	Rmndr expired	021708293		
25 Jun, 2012 13:00	24 Jun 16:01 (2)	021708293		Emma Berry
28 Jun, 2012 12:00	21 Jun 13:05 (2)	021708293	mark.jenks@woosh.co.nz	Jen Black
29 Jun, 2012 10:30	22 Jun 13:01 (1)	021708293		Kirsten Wech
30 Jun, 2012 10:00	23 Jun 20:01	021708293		Mike Dark
26 Jul, 2012 15:45	26 Jun 16:01 (2)	021708293	mark.jenks@woosh.co.nz	Mark Jenks

And now the calendar views, yearly, monthly, weekly and daily. Yearly first :

Show only appointments containing the string or use profile, short name and location to search

Any search currently in action will be displayed here

Go to the month in month view

Display a week view in this case starting 8th Jan

Today in a red box

Go to a day view for this

If a day is highlighted in red, it has appointments. Hover over the day to display a popup of appointments, notes and any reminder replies

If a day is shown in *italics*, it has had a new appointment added

Appointments, 2012

January

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

February

Sun	Mon	Tue	Wed	Thu	Fri	Sat

April

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

May

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

June

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Jul

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

August

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

And here is the monthly calendar, the default when choosing Calendar from the Appointments menu :

The screenshot shows a web-based monthly calendar for August 2012. The interface includes a search bar at the top with filters for 'All', 'Short name', and 'Location'. Below the search bar are links for 'This year', 'This month', 'This week', and 'This day'. The calendar grid displays days from Sunday to Friday. Several appointments are listed, including 'Mark Jenks, Mark, Kumeu' on Wednesday the 8th, 'Pete Snake, Mark, Kumeu' on Wednesday the 15th, and 'Mark Beane, Mark, Kumeu' on Wednesday the 29th. A red box highlights the 23rd of August. Callout boxes provide instructions on how to use the calendar features.

Search and display criteria

Any search is displayed here

Add a new appointment for this day

Existing appointments, click to edit. If in italics, hover to display reminder replies and notes

Send a quick SMS to the appointment mobile

Go to week view, in this case starting 19th Aug

Today

Icons to select different views

Click on a day to go to day view

Navigate next/prev month or same month next/prev year

And a week view :

Hover over a day to show appointments that day, click to go to day view for that day

Go to week view for that week

New appointment for the displayed day

Appointment notes

Date, time and text of any SMS text replies to an appointment reminder

Appointment details, who, short name and location

Send a quick SMS to the associated mobile

And the day view :

New appointment is here in this view

Creating and editing appointments

Appointments can be created from the contacts lists, from the calendars, from the appointments list view or by uploading appointments from file.

When creating an appointment from the calendars or the appointments list view it is possible to add the contact details entered to an existing contacts list for use in the future.

Creating an appointment :

Profile : **Default**, Reply address : **mark.jenks@woosh.co.nz**, From name : **TxTStream**

Add/Edit appointment

Mobile

EMail

First name

Last name

Full name

Add to contact list

Do not add details to a contact list

Appointment date

05 Feb 2012 12:00

☐ No reminder

☒ SMS only

☐ EMail only

☐ SMS & EMail

☒ Send reminder 1 day(s) before appointment at 16:00

☒ Send reminder 1 week(s) before appointment at 13:00

Short name

Mark

Location

Kumeu

Reminder message

Hi, just a reminder that you have an appointment with us at hh:mi.. on the dddd of MMM. Please reply if you cannot make it. \$LC\$ \$SN\$

Override message

Notes

Go to confirm

Back

The profile is displayed and this will govern the email address where any appointment reminder replies go to. It also provides the default short name and location, though any short name and location present in the profiles can be selected.

If you want to add the contact information to an existing contact list, choose the appropriate contact list.

When filling in contact details, if you supply a first and last name, the system will fill in the full name.

Enter the appointment date in the format already provided or use the popup calendar from the icon. The calendar will not let you enter appointments for past dates.

We will cover appointment reminders and how to set them up in the next section. However, you may choose to select no reminder or just limit any reminder to email only.

Any defined appointment reminder schedules will be displayed and you may deselect these as required.

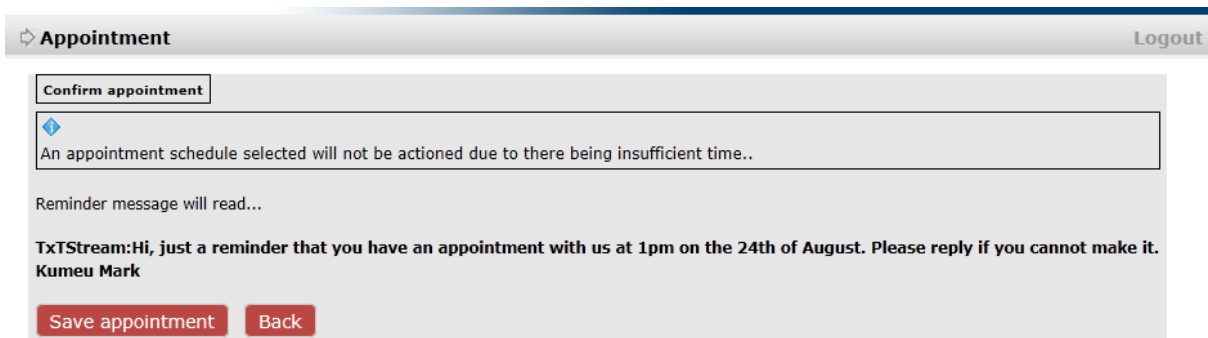
You may change the profile's short name and location. The short name and location are used in two ways. Firstly, they provide a means to categorize or select a set of appointments in the calendars and appointments list view e.g. see only appointments for Gill, or only appointments for Albany. Secondly, they can be used as replaceable parameters in the appointment reminder itself e.g. you have an appointment with Gill at Albany on the... etc. etc.

The SMS text appointment reminder message without any replacements made is displayed for reference. Once you go to confirm the appointment, the system will redisplay this with replacements made so you can see exactly what it will look like.

You may override the appointment reminder message completely. The reminder, if required, will still be sent out on schedule, but with your override message instead. Any override message can also have replaceable parameters contained within it, such as name, short name, location, times and dates etc.

Add any notes required. These will be available as hover popups on the calendars and appointments list view.

Once you click confirm, the following page is displayed :



Any replacements are made so you can view the SMS appointment reminder message and in the case above, because there would not be sufficient time to send a reminder one week before, the system has let us know that with the warning box displayed.

Setting up appointment reminders and schedules

In this section we will be looking at how to setup appointment reminder defaults and how to define the appointment reminder delivery schedule(s) as well as looking a bit more at replaceable parameters as they pertain to appointment reminders.

If you are going to be using appointments and appointment reminders, you will want to set these up as soon as possible after subscribing to Easy Message. When you do subscribe, the system will setup a default reminder and a default schedule for you (1 day before appointment at 16:00 (4pm)) but you should certainly review these.


Appointment reminder defaults and schedules can be found by going to the Settings menu and choosing Reminder defaults.


The reminder defaults page actually has four sections to it, current schedules, reminder defaults, adding a schedule and testing your reminder message. To keep things simple here we will treat it as three separate pages. First let's look at appointment reminder schedules :

Reminder defaults

Current profile : **Default**, Reply address : **mark.jenks@woosh.co.nz**, From name : **TxTStream**

Current reminder schedule(s)

 Send reminder 1 day(s) before appointment at 16:00

 Send reminder 1 week(s) before appointment at 13:00

Add new schedule

Send reminder before appointment at

Add schedule

You can create multiple schedules. At least one reminder schedule must exist. To change a single schedule, create another schedule and delete the one you do not wish to apply. If you create a new schedule, existing appointments will not be affected

You may add additional schedules as we can see in the example above. Remember that a schedule applies to both SMS text reminders and email reminders if you are using these. You can select to send no reminder, just SMS, just email or both when you create a new appointment.

At least one reminder schedule must exist, so if you wish to change the default schedule, create another schedule and then remove the one you don't want. Use the drop down boxes to select the time periods and delivery time.

The page also displays the default reminder settings :

Edit reminder message

From name:

Email subject:

Email template:

Reminder message (15 left):

Pre-defined fields:

Save reminder message

An SMS text is formatted 'FromName:YourMessage' so the from name identifies who the text is from. This usually your name or your business name and you will want to make it as short as possible in order not to take up message space

When sending appointment reminders via email, you will want to include an email subject

Appointment reminders via email need to use an existing email template

Enter your reminder message. Use the Pre-defined inserts selection below to insert a date or time format at the cursor position

Select one of these pre-defined fields and it will be inserted in the default reminder message above at the last cursor position

The system will have setup upon subscription a default reminder message :

Hi, just a reminder that you have an appointment with us at hh:mi.. on the dddd of MMM. Please reply if you cannot make it.

Remember that the from name will prefix the message giving :

TxTStream:Hi, just a reminder that you have an appointment with us at hh:mi.. on the dddd of MMM. Please reply if you cannot make it.

If the appointment date were the 24th Aug, 2012 at 16:30 or 4:30pm, the final message would read :

TxTStream:Hi, just a reminder that you have an appointment with us at 4:30pm on the 24th of Aug. Please reply if you cannot make it.

The from name can be changed here as required and this from name will be used for all SMS text appointment reminders regardless of the profile that created the appointment.

Notice the pre-defined fields item. To use a date, time, name or user-defined data replaceable parameter in your reminder message, click the cursor in the reminder message where you want the parameter to go, and then use the mouse to select the pre-defined field parameter from the drop down list. The parameter will be placed where required.

The following replaceable parameters can be used to get fine control over how your message looks :

dd MMM e.g. 12 May
dd MMM hh:mi.. e.g. 12 May 10:00am
dd/mm/yyyy e.g. 12/06/2013
DDD,MMM dd hh:mi.. e.g. Tue, Feb 10, 10:30am
DDD e.g. Tue
dddd e.g. 1st, 2nd, 3rd etc.
dd/mm/yyyy hh:mi.. e.g. 12/06/2013 10:00am
dd MMM hh:mi e.g. 12 May 15:00 (24 hr clock)
dd/mm/yyyy hh:mi e.g. 12/06/2013 15:00 (24 hr clock)
dd/mm e.g. 12/06
hh:mi.. e.g. 10:30am
HH:mi e.g. 15:00 (24 hr clock)
MMM e.g. May
\$LC\$ Location, taken from appointment
\$SN\$ Short name, taken from appointment
\$N\$ Name, taken from the appointment
\$LN\$ Last name, taken from the appointment
\$FN\$ First name, taken from the appointment
\$UDF1\$ User-defined field 1, taken from a contact when applicable
\$UDF2\$ User-defined field 2
\$UDF3\$ User-defined field 3
\$UDF4\$ User-defined field 4
\$UDF5\$ User-defined field 5

These replaceable parameters can also be used in reminder emails. Of course, a reminder email gives far more scope to include images, text, movies, formatting, news etc.

An appointment reminder email must be defined as a template. Refer to the Easy Message Lite user guide. It is possible to just use a very plain text message in the template with the same replaceable parameters. If you are going to be using appointment reminders via email, select the template here and supply an email subject otherwise the email will arrive in the inbox with a subject something like <no subject>.

The \$UDF\$ fields can only be used if you always create appointments from a contact. As is the case with all replaceable parameters, if the data does not exist, the parameter itself is removed from the message.

And now let's look at how we can test our SMS text appointment reminder to ensure it is perfect :

Send test reminder message

Mobile

Mobile number to send the test message to

Before sending a test message, ensure you have saved any changes to the default reminder message above. If you have chosen name replacements, the test name of Gill Jones will be used...

Send test

Simply enter the mobile number you wish to send the test to, and you will receive the test message. The system will perform any parameter replacements and send a test message using test data.

Uploading appointments from file

A lot of software systems have the capability to manage appointments but not the capability to send appointment reminders via SMS text or email. Easy Message allows you to upload appointments from another system using .csv or Excel .xls and .xlsx files.

If we go to the Upload appointments menu item, the following page is displayed :

File upload

Logout | Home

Upload

File name [Browse...](#) Use the browse button to locate the file you wish to upload

Description Optional but desirable to identify the upload in the upload log

☐ No reminder ☒ SMS only ☐ Email only ☐ SMS & Email This selection will apply to all appointments uploaded

Short name Location If location and/or short name are not present in the uploaded file, the selections here will be used

Upload

Excel (older versions as .xls and newer versions as .xlsx) and .csv (comma-delimited) files may be uploaded.

As a minimum, the file must contain an appointment date, a name and a mobile number or email address. It may also contain a location, a short name and notes.

You will be able to map the columns once the file is uploaded and before it is processed.

Last 10 appointment uploads

	Uploaded	File name	Description	By	Accepted	Errors
Errors	20 Jun, 2012	Partners Database.csv	TestBadFile	Default	0	102
Errors	19 Jun, 2012	TestAppointments.xlsx	Test upload, should fail	Default	0	2

Browse for the file required and supply a meaningful description. The actual upload process and column mapping process (i.e. mapping columns from what the supplied columns are called to those that we want) is the same as the contact list upload described in the Easy Message Lite user guide.

Choose how to set reminders in the uploaded appointments. If the file does not have the short name and location columns you may select them here and apply them to all uploaded appointments from this file.

Any upload errors will be shown after the upload and saved for review.

To protect against unwanted reminders, the system will not send out any retrospective reminders, only those that are valid for the uploaded appointments.

Using appointment follow ups with or without complaints/feedback

Appointment follow ups can be used in a number of ways and here are a few examples :

- Send a follow up a day after an appointment or event, asking the recipient to reply if there was anything they were unhappy about or any ways a service or product could be improved
- Send a follow up SMS text six months after a car service, asking the recipient if they wish to book another service. In conjunction with a communications keyword, the recipient could be requested that they text in using a keyword if they wish to book it
- Send birthday greeting for the next two years to a valued customer

In their simplest form follow ups give you the ability to schedule one or more follow up messages (SMS text or email) after an appointment.

Follow ups can also be used in conjunction with a communications or complaints/management keyword, or to solicit service level feedback directly via SMS text reply.

The general rule is that any reply to a follow up SMS text is automatically entered into the complaints/feedback console as a new message and subsequently will be subject to any message escalations that are defined.

By default, follow ups are turned off, you will need to go to the Settings menu, Follow ups to turn them on. The setup for follow ups is very similar to the reminder defaults and setting schedules is exactly the same, so we will just show an example of the follow ups page :

Send follow up 1 day(s) after appointment at 16:00

Follow up settings

☒ Follow ups active By default, follow ups are turned off

☒ SMS follow up ☐ EMail follow up

From name

EasyMessage

Email subject

Appointment follow up

Email template

No template selected ▼

Follow up message

Hi \$n\$, If there is anything at all you wish to comment on or ways we can improve our service, reply to this message. Thanks

Pre-defined fields

dd MMM hh:mi.. e.g. 12 May 10:00am ▼

An SMS text is formatted 'FromName:YourMessage' so the from name identifies who the text is from. This usually your name or your business name and you will want to make it as short as possible in order not to take up message space

When sending appointment follow ups via email, you will want to include an email subject

Appointment follow ups via email need to use an existing email template

Enter your follow up message. Use the Pre-defined inserts selection below to insert a pre-defined replacement at the cursor position

Select one of these pre-defined fields and it will be inserted in the default follow up message above at the last cursor position

Save follow up message

Follow ups can be either SMS text or email and if email is required, you will need to create an email template. Like reminder defaults, you may use pre-defined fields to personalise and customise your message. There is a test facility so you can see what your personalised message will look like as an SMS text.

The example above shows the default supplied message. In this case a personalised SMS follow up is being used to give our client or customer the opportunity to provide feedback on our service levels. Should the recipient choose to reply, that reply will become a new item in the complaints/feedback console.

Complaints/feedback management

Most businesses encounter complaints or have to deal with unsatisfied customers. Research in the area of complaints management shows that very few dissatisfied customers or clients will complain face to face. However, these same dissatisfied customers and clients will tell the people around them about their dissatisfaction. The cost of retaining a customer or client in most business and service situations is negligible compared to that of acquiring new customers.

Positive word-of-mouth communication by customers and clients to friends, acquaintances and family is an effective way to grow a business. Being able to turn a dissatisfied customer or client into a promoter of your business or service requires that any complaints or niggles are dealt with effectively and quickly.

Easy Message has complaints management functionality geared towards allowing complaints and feedback via text messages and managing that feedback in a simple and effective way.

How does complaints management provide feedback? With complaints management, you can choose a keyword, and then let your clients and customers text their comments to you using that keyword, from their mobile. Let's say that you chose the keyword 'feedback'. After letting your clients and customers know that you now have the ability to accept feedback, they know that they can let you know about the bad, and the good things relating to your products and services.

Complaints management functionality is available via the Settings menu and the Complaints management console. As these work in conjunction with each other we will cover the settings and reports in the sections below.

Getting a keyword

Check complaints management keyword availability

Logout | Home

AvailabilityGet keywordStatusesAnalysis groupsEscalation

Check Keyword

Short code819Choose the short code against which you wish to check availability. If there is only one short code available at present, it will be selected for you

KeywordThe keyword must be a minimum of four characters long

Check

Use this page to check if a keyword is available. Upon checking, if your keyword is available, there will be a link to take you through obtaining a keyword. Once setup, the keyword will be available immediately and you will be able to text the keyword and your message to the short code. Use the statuses settings to define relevant statuses that can then be used in the complaints management report to classify how complaints messages are being handled. Some default statuses have been provided for you.

The first thing that we need to do when setting up complaints management is to check on the availability of a keyword. Simply enter the keyword and choose a short code. If you have chosen an available keyword, you will see the page below :

Check Keyword

feedback is available on 819! [...click here to get it...](#) (You won't be charged immediately, we need some more details)

Short code819Choose the short code against which you wish to check availability. If there is only one short code available at present, it will be selected for you

KeywordfeedbackThe keyword must be a minimum of four characters long


Check

You can click on the '...click here to get it...' link. It is the same as using the Get keyword menu tab but fills out most of the required fields for you :


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Availability **Get keyword** **Statuses** **Analysis groups** **Escalation**

ShortCode	Keyword	FromName	EMail	Reply	Created	Charge
  819	complaint	TxTStream	mark.jenks@woosh.co.nz	Thank you for your enquiry. We will be in touch	10 Sep, 2012	\$29.95

Use the availability tab to check keyword availability on a particular short code...

Complaints Keyword		
Short code	<input type="text" value="819"/> 	Choose the short code for this keyword
Keyword	<input type="text" value="feedback"/>	The keyword must be at least four characters long
From name	<input type="text" value="TxTStream"/>	The from name precedes the reply message and identifies who the reply is from. It will be included in the characters left count below
Reply	<input type="text" value="Thank you for your enquiry. We will be in touch"/> (103 left)	The reply message sent immediately on receipt of a mobile originated message
EMail	<input type="text" value="mark.jenks@woosh.co.nz"/>	This is the email address that mobile originated messages will be forwarded to
Monthly charge	\$29.95	This is the monthly charge that will be added to your ebill for the keyword. You may cancel the keyword whenever you wish.

The fields are explained on the page. Once you have a keyword, it is available immediately. If your keyword was for example **feedback**, your clients and customers can text from their mobile phone something like :

feedback the service was great, but maybe the wait just a little too long

to the short code you have designated. They will immediately receive the reply above to acknowledge their message.

The system will do two things with the mobile originated message. First, it will send an email to the designated email address as per the page above. Then it will create a new item in the complaints management system. Before we cover off the Status, Analysis groups and Escalation items we can see on the menu tabs above, let's have a look at an example of the Complaints management messages page :

The screenshot shows the 'Complaints messages' interface. At the top, there are tabs for 'Messages and statuses', 'Text analysis', and 'Feedback'. A callout 'Select different statuses' points to the 'Status' dropdown menu. Another callout 'Feedback average close time' points to a box showing '7403 mins'. Below the dropdowns, there are search filters for 'Status', 'Allocated to', and 'Ref#'. The main table displays a list of messages with columns: Status, Ref#, Updated, By, AllocatedTo, Received, Shortcode, Keyword, Mobile, Message, and Emailed to. Two messages are highlighted: one with status 'Under investigation' (red background) and one with status 'Resolved not OK' (yellow background). Callouts explain the features: 'Colour coding for easy identification' points to the red and yellow background colors; 'Use open to add notes, change statuses and allocate' points to the 'Open' link in the 'Status' column; 'Full message and activity history' points to the detailed message content and activity log; and 'Quick SMS for quick contact' points to the mobile number in the 'Mobile' column.

Status	Ref#	Updated	By	AllocatedTo	Received	Shortcode	Keyword	Mobile	Message	Emailed to
Under investigation	Open	15 Sep, 2012 15:37	Default	Default	10 Sep, 2012 11:12	819	Test	6421708293	my food was cold when I got it and i had to wait a long time	mark.jenks@woosh.co.nz
16 Sep, 2012 10:47 by Default, Allocation notification email sent to mark.jenks@woosh.co.nz (Default) (9)										
16 Sep, 2012 10:47 by Default, Allocated from Guy to Default										
15 Sep, 2012 15:37 by Default, Status was changed from New message to Under investigation										
15 Sep, 2012 15:37 by Default, Allocated from None to Guy										
Resolved not OK	Open	20 Sep, 2012 14:24	Default	Guy	10 Sep, 2012 11:12	819	Test	6421708293	The service was OK but the toilets were bad, really bad	mark.jenks@woosh.co.nz
16 Sep, 2012 10:47 by Default, Allocation notification email sent to guy@logicalnetworks.co.nz (Guy) (9)										
16 Sep, 2012 10:47 by Default, Allocated from None to Guy										
15 Sep, 2012 14:24 by Default, Status was changed from New message to Resolved not OK										
15 Sep, 2012 14:24 by Default, Finally resolved this										

This page allows you to manage and track feedback and complaints, allocate feedback for action, add notes and use the quick SMS functionality to send follow up messages.

Statuses

Any messages received will initially be created in complaints management with a status of new message and an identifying colour of red. Upon subscribing to Easy Message, the system will have set up some default statuses for you. You can edit the system provided statuses and add your own. Here is the status definition page :

Complaints statuses
Logo

Availability
Get keyword
Statuses
Analysis groups
Escalation

Status	Escalation	Color
Closed	Closed, no more escalation will be performed	Green
Hold	On hold, temporarily, no escalation	
Resolved not OK	Use an escalation reminder as per escalation settings	Yellow
Resolved OK	Closed, no more escalation will be performed	Green
Under investigation	Escalate normally depending on complaint settings and escalation settings	Blue
Unfounded	Closed, no more escalation will be performed	Black

Statuses have escalation behaviour associated with them

Add/Edit Status

Status The status description. You can change message statuses on the Complaints report

Colour None You can associate a color with the status to provide a visual reference on reports. New messages will always show as red with a status of New message

Escalation None Use the status escalation type in conjunction with escalation settings to control escalation behaviour. See Escalation under Complaints managements settings

Add/Update

On this page, we are doing two things. We can define or edit feedback statuses and display colours, and we are defining some of the characteristics of escalation which we will explain next.

Escalation

One of the features of Complaints management is escalation. Escalation uses escalation settings to determine when feedback has been sitting too long on a particular status and requires action. To facilitate this, the escalation process will monitor both the feedback and the current status to determine if a reminder email needs to be sent. In addition, a closed complaint or feedback message may have a delayed reminder status, triggering a reminder email after it has closed if follow up is required. Here is the escalation settings page :

Escalation settings

Availability
Get keyword
Statuses
Analysis groups
Escalation

Escalation settings

Escalation enabled ☒

Include public holidays ☐

Include Saturdays ☐

Include Sundays ☐

Day start time Use the 24 hour clock e.g. 08:30

Day end time Use the 24 hour clock e.g. 17:00 for 5pm

New message escalation : If a new message has not changed status within hours send an email to :

General escalation : If a complaint with a normal escalation status has not changed status within hours send an email to :

Reminders : After a complaint is closed, if it has an escalation type that specifies a reminder, send an email to : after hours

Save escalation settings

The escalation settings work in conjunction with the statuses to determine when someone needs to be reminded of a complaint or feedback item. Using the start and end day times and the include options allows you to control how escalation triggers are calculated.

It is possible to just calculate on raw hours for instance by clicking on both the include checkboxes and setting start and end time to 00:01 and 23:59 respectively. More usefully you will want to set the start and end times to match your work day, and the include checkboxes to match how your business operates.

As an example. A business operates Mon through Fri and is part time in that the usual start time is 09:00 and the finish time 14:00 or 2pm. To prevent unwanted escalations say over the weekend, the start and end times are entered to match the operating hours. That means that if feedback is received at 3pm on a Fri, and the new message escalation is set for 6 hours, the escalation will in fact be triggered at 3pm on the following Mon. i.e. 6 working hours.

This page also allows escalation to be turned off completely, or any of the escalation items (new message, general escalation, reminders) to be disabled by setting the escalation hours to zero.

Keep in mind that statuses interact with escalation e.g. a status may be defined as an on hold escalation type status and so any escalation would be disabled while that status is associated with the feedback or complaints item.

The reminder escalation allows for an email reminder once a complaint or feedback message is closed for any follow up action and can be set up to 999 hours into the future.

Analysis groups

One of the hardest things for a business to obtain is an accurate measurement of what the common factors are in complaints and feedback. Easy Message provides a couple of tools for this.

Easy message has a facility that allows words and phrases to be defined and those words and phrases can then be used to group and quantify complaints and feedback messages. To get you started, the system provides a couple of defaults so let's have a look at the analysis groups page :

Complaints analysis groups

Logout | Home

AvailabilityGet keywordStatusesAnalysis groupsEscalation

Group	Keywords
NegativeEmotion	wait, queue, bad service, unfriendly, wrong, bad
PositiveEmotion	good, great, enjoy, friendly, best, recommend

Complaints analysis groups

Group

Keywords

Save

Provide an analysis group name and then the keywords you wish to associate with this text analysis group. Keywords must be separated by commas. Keywords may be upper or lower case or mixed. A keyword can be a phrase made up of no more than two words e.g. long wait. The system will use the keywords and keyword phrases along with a thesaurus to match variants found in complaints. e.g. if a phrase is 'long wait', the system will consider 'too longer a time and big wait' a match. Common english stop words are removed e.g. my, for, the etc. so don't include them as keywords.

You will probably want to add your own groups and refine or add to the default analysis groups using the complaints messages text to refine the system.

Easy Message eliminates common English words from the text that have no inherent meaning, commonly called 'stop' words. These are words like 'the', 'or', 'my' etc. So don't use these as keywords or in phrases.

Easy Message uses a thesaurus, so if we were to provide the phrase 'burnt coffee', the system would identify 'burnt', 'burning', 'burn' etc.

The system also uses a near word match. What this means is that if you provide a phrase e.g. 'burnt coffee' the system will consider all of the following examples a match :

The coffee was so hot it was burning my tongue

Maybe don't burn the beans in my coffee so much

The coffee was so burnt it was tasteless

As you can see from the examples above, this can be an extremely powerful tool in identifying common themes in your complaints and feedback. Let's take a quick look at an example report that uses the default analysis groups provided :

Complaints analysis

Messages and statuses Chart usage Word cloud Text analysis

Select Group

NegativeEmotion Go

Sort by date

Keywords : wait, queue, bad service, unfriendly, wrong, bad

Selected 79 of 79 (100%)

When	Message
10 Sep, 2012 11:12	my food was cold when I got it and i had to wait a long time
10 Sep, 2012 11:12	The service was OK but the toilets were bad, really bad

When defining or refining analysis groups and their keywords make sure to only use phrases of two words, do not use 'stop' words, and use the word root if possible so that the thesaurus functions effectively.

Word clouds

The second tool Easy Message provides is the word cloud. This allows you to identify common repetitive words in your complaints and feedback and can serve as a useful tool in refining analysis groups. The example word cloud below is not a particularly good one due to the lack of data in the test system, but word clouds are relatively common so it should show the concept :

Messages and statuses

Chart usage

Word cloud

Text analysis

Messages and statuses

Chart usage

Word cloud

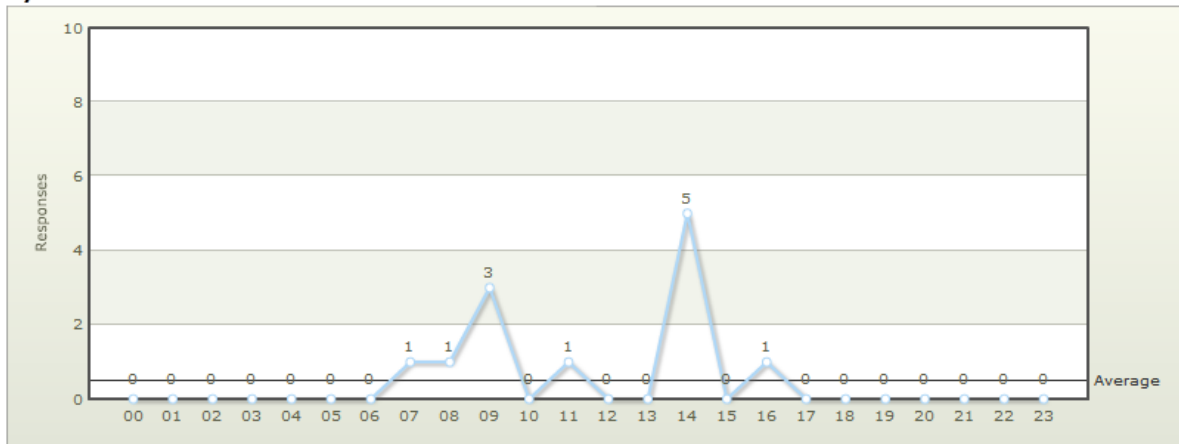
Text analysis

When	Message
04 Oct, 2012 17:12	Whats with the WAITing??
04 Oct, 2012 17:11	had ti WAIT 15mins
03 Oct, 2012 20:38	that was such a bad meal, long WAIT, tasteless
03 Oct, 2012 20:35	you guys are good but sometimes the WAIT is just not worth it
03 Oct, 2012 20:32	that was such a bad meal, long WAIT, tasteless

Usage charts

To enable you to track how the complaints keyword(s) are being used, Easy Message can display charts by day, by hour and by weekday for each keyword. An example chart for usage by hour is shown below :

By hour



Managing a complaint

Once you have complaints or feedback items in the system, these need to be managed. To refresh, here is an example of the complaints management console :

Complaints messages
Logout | Home

Messages and statuses
Chart usage
Word cloud
Text analysis

7403 mins

Average close time

Status :
Allocated to :
Ref# :

Status	Ref#	Updated	By	AllocatedTo	Received	Shortcode	Keyword	Mobile	Message	Emailed to	
Under investigation	Open	15 Sep, 2012 15:37	Default	Default	10 Sep, 2012 11:12	819	Test	6421708293	my food was cold when I got it and i had to wait a long time	mark.jenks@woosh.co.nz	
		16 Sep, 2012 10:47 by Default, Allocation notification email sent to mark.jenks@woosh.co.nz (Default) (9)									
		16 Sep, 2012 10:47 by Default, Allocated from Guy to Default									
		15 Sep, 2012 15:37 by Default, Status was changed from New message to Under investigation									
		15 Sep, 2012 15:37 by Default, Allocated from None to Guy									
Resolved not OK	Open	15 Sep, 2012 14:24	Default	Guy	10 Sep, 2012 11:12	819	Test	6421708293	The service was OK but the toilets were bad, really bad	mark.jenks@woosh.co.nz	
		16 Sep, 2012 10:24 by Default, Allocation notification email sent to guy@logicalnetworks.co.nz (Guy) (9)									
		16 Sep, 2012 10:24 by Default, Allocated from None to Guy									
		15 Sep, 2012 14:24 by Default, Status was changed from New message to Resolved not OK									
		15 Sep, 2012 14:24 by Default, Finally resolved this									

Each message is displayed with a status and its identifying colour. A full history of all changes is displayed underneath the message. Clicking on the open link displays the feedback edit page which allows you to edit escalation settings, enter notes, change a status, and allocate a message to a particular profile :

[Edit complaint](#) [Log](#)

[Back to report](#)

Message #1 received 10 Sep, 2012 11:12 : my food was cold when I got it and i had to wait a long time

Complaint status

Escalation enabled ☒ [Save escalation settings](#)

Status Under investigation [Save status change](#)

Allocated to Default [Save allocation change](#)

An email will be generated to the profile email address whenever allocation changes

Notes

[Save notes](#)

Make sure to save your changes against each item

You may disable any applicable escalation for this message.

Make sure to change one item at a time and use the associated save button.

When you change the allocated to item a notification email will be sent to the profile email reply address notifying them that they have been allocated this complaint or feedback item.

As a final note, we have found through many years of experience that the description of how to use a keyword has a huge impact on how effective it is. We recommend that you use the wording **Text the word KEYWORD to 0000 and then your email address** as an example. Avoid the use of punctuation around the keyword.

Communications keywords

Use communications keywords to open up new channels via mobile originated messages to your clients and customers.

Communications keywords allow you to provide variable responses depending on message content and just as importantly, email notifications to different email addresses depending on message content.

Some examples of how communications keywords can be used :

- Place your keyword on print and other media advertising e.g.
 - *Text the word GETITNOW to 0000 and yr email address and we will send you the brochure*
- Let your current customers and clients know that you have this facility and use it to initiate appointments e.g.
 - *Text the word GETAPPT to 0000 and yr preferred date and time and we will confirm asap*
- Use variable responses to provide tailored feedback and notifications e.g.
 - *Text the word PROPERTY to 0000 and the code #123456. We will send you the details and the agent will be in touch*

There are many advantages to this approach. The client gets immediate feedback via a reply message or a tailored reply message depending on message content. It's an effective way to become 'top of mind'.

If variable responses are used, different agents or the people directly responsible for the enquiry will be notified by email depending on the message content.

The communications console allows you to manage the messages and like the complaints management functions, change the message statuses or quickly SMS text back, with say, a new appointment time.

As getting a keyword and managing the statuses for communications keywords is a very similar process to the complaints management function, please refer to that section.

Here is an example of the communications keyword messages console :

Communications messages Logout | User guide | Home

Messages and statuses Chart usage

Status :

Status	Ref#	Update Status	Updated	By	Received	Shortcode	Keyword	Mobile	Message	Reply	Emailed to	
Referred	80	<input type="text" value="Referred"/>	Update	15 Sep, 2012 15:34	Default	10 Sep, 2012 11:12	819	Test	6421708293	Could u plse schedule a new appointments for Fri anytime and let me kno	Thank for your enquiry, we will be in touch	mark.jenks@woosh.co.nz

The system will have provided some default statuses and you can add your own or edit the default ones.

The quick SMS icon allows you to SMS text back a message from this page.

Usage charts are available by keyword and by day, weekday and hour of day allowing you to gauge the effectiveness of your keywords.

Using variable responses

Variable responses enable you to match incoming message content to a particular response and just as importantly to a particular email address that will be notified of the enquiry.

Variable response data can be manually loaded or be uploaded from file. Here is an example of the variable response data entry page :

variable responses Logout | User guide

Availability Get keyword Statuses Variable responses

[Upload a file \(comma delimited .csv or Excel .xls, .xlsx\)](#)

You are working with the Keyword : **test** with a from name of : **TxTStream**

Variable response

Key

If this key is found in the incoming message, send the reply below

Reply
(150 left)

Email

This is the email address that mobile originated messages will be forwarded to. If blank the email address supplied for the keyword will be used

Add/Update

View all

Showing top 50 newest variable responses...

Key	Reply	Email
126	Response 126	mark@digitaldynamite.co.nz
12345	Response 12345	mark.jenks@woosh.co.nz

Use the View all button to view and sort all variable responses for a keyword, or delete all variable responses for a keyword.

In our property keyword example above, you may have something advertised on property sales signage like :

Text the word PROPERTY and #12345 to 0000 and an agent will be in touch

The response returned to the mobile might be something like :

Thx, 4Bdrms, Intnl dble gge, 2 bath, massive views, full section, circa 460k, keen sellers. Doug will be in touch

Instead of all notification emails going to the email address used when the keyword was setup, Doug gets the notification email.

Easy Message uses the key to match to a particular response. Before we talk further about keys, keep in mind the following points. If a variable response does not have an email address, the email address supplied when the keyword was setup will be used. If a match cannot be made, the keyword reply will be used.

Variable response keys

If the variable responses checkbox is ticked when setting up the keyword, upon receipt of an incoming message containing the keyword, Easy Message will endeavour to extract the key by :

- Removing the keyword from the message
- Searching for a # in the message and then extracting the data up to the next space, or if no more spaces, till the end of the message
- If no # was found, search for the first space and extract the preceding data or if no spaces, take the entire message

Easy Message will then try to match the extracted key to one of the keys in the variable responses. If it cannot, it will use the defaults for the keyword.

This approach gives flexibility in that the key can exist at the beginning of an incoming message after the keyword with no #, or anywhere within the message as long as it preceded by a #.

Uploading variable responses from file

Like contacts lists and appointments, variable responses can be uploaded from file. The variable response upload process differs from the other two in that it always performs an edit/add operation. If you have variable responses on file for a keyword and merely wish to add new ones from file or edit any existing ones, then you can simply upload a refreshed file. If you want to start from scratch, then on the variable responses page, click on View all and use the Delete all facility.