EASY MESSAGE

powered by TXTSTREAM

TXTSTREAM

Easy Message Pro

User Guide

V2.0

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Shared functionality between Lite and Pro

Easy Message Pro and Easy Message Lite share some basic messaging functionality. Please read the Easy Message Lite User Guide to get you started.

This section details where Easy Message Pro adds a couple of additional features to the Easy Message Lite basic functionality in order to provide for appointments and calendar integration.

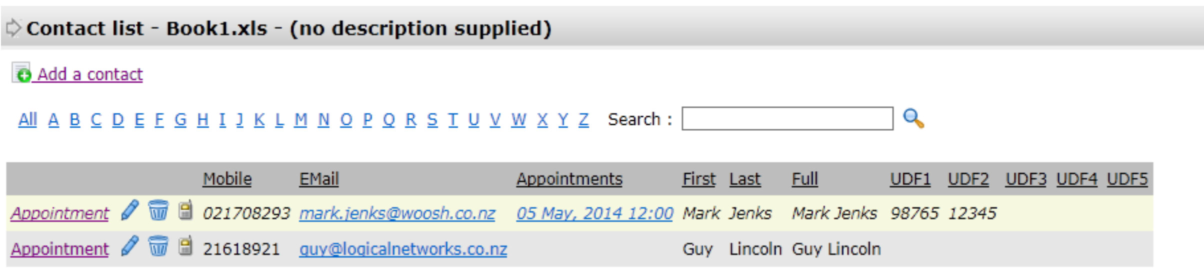
Profiles

Short name – Usually a Christian name for the profile which can be used with appointment reminders and follow ups or as a replaceable parameter in texts and emails e.g. You have an appointment with Stella.

Location – A geographical location. Like the short name, it can be included in texts and emails and is a replaceable parameter e.g. You have an appointment at Kumeu.

Viewing contact list members

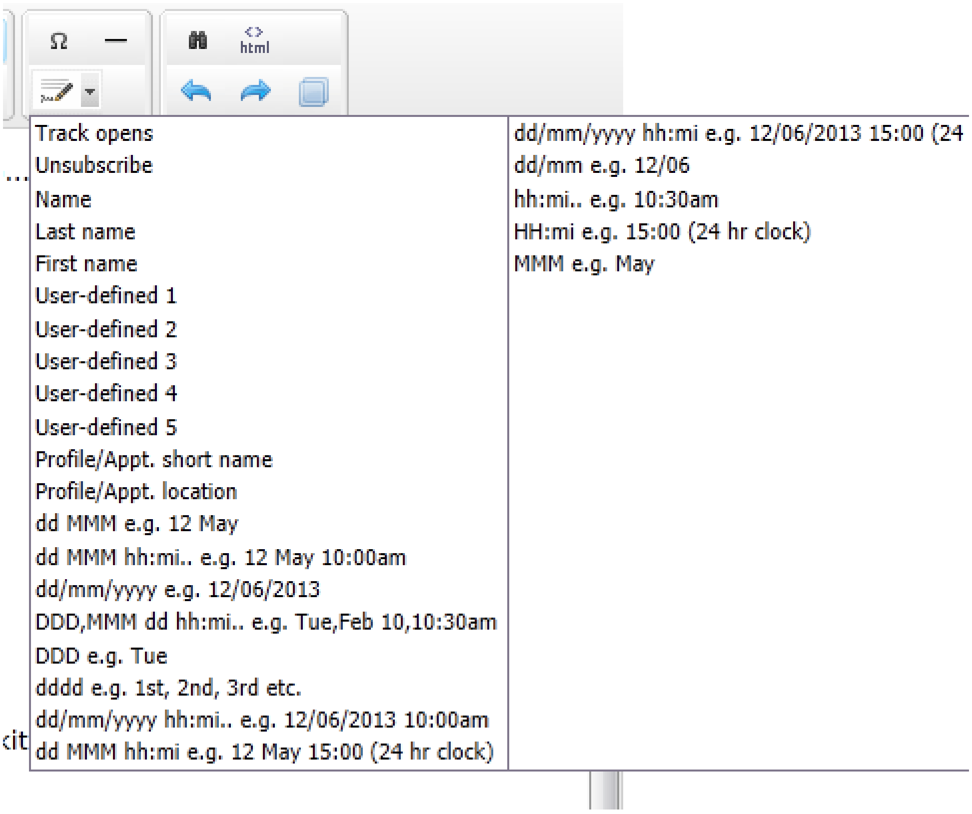
When viewing contact list members, appointments against a member will be displayed and there is an appointmentss link to create new appointments :



Clicking on an appointment will take you directly to the appointments page, where the appointment can be edited or deleted.

Creating and editing templates

In order to provide for follow-ups and appointment reminders, Easy Message Pro allows an enhanced set of replaceable parameters when creating templates. The screen shot below shows the full set :

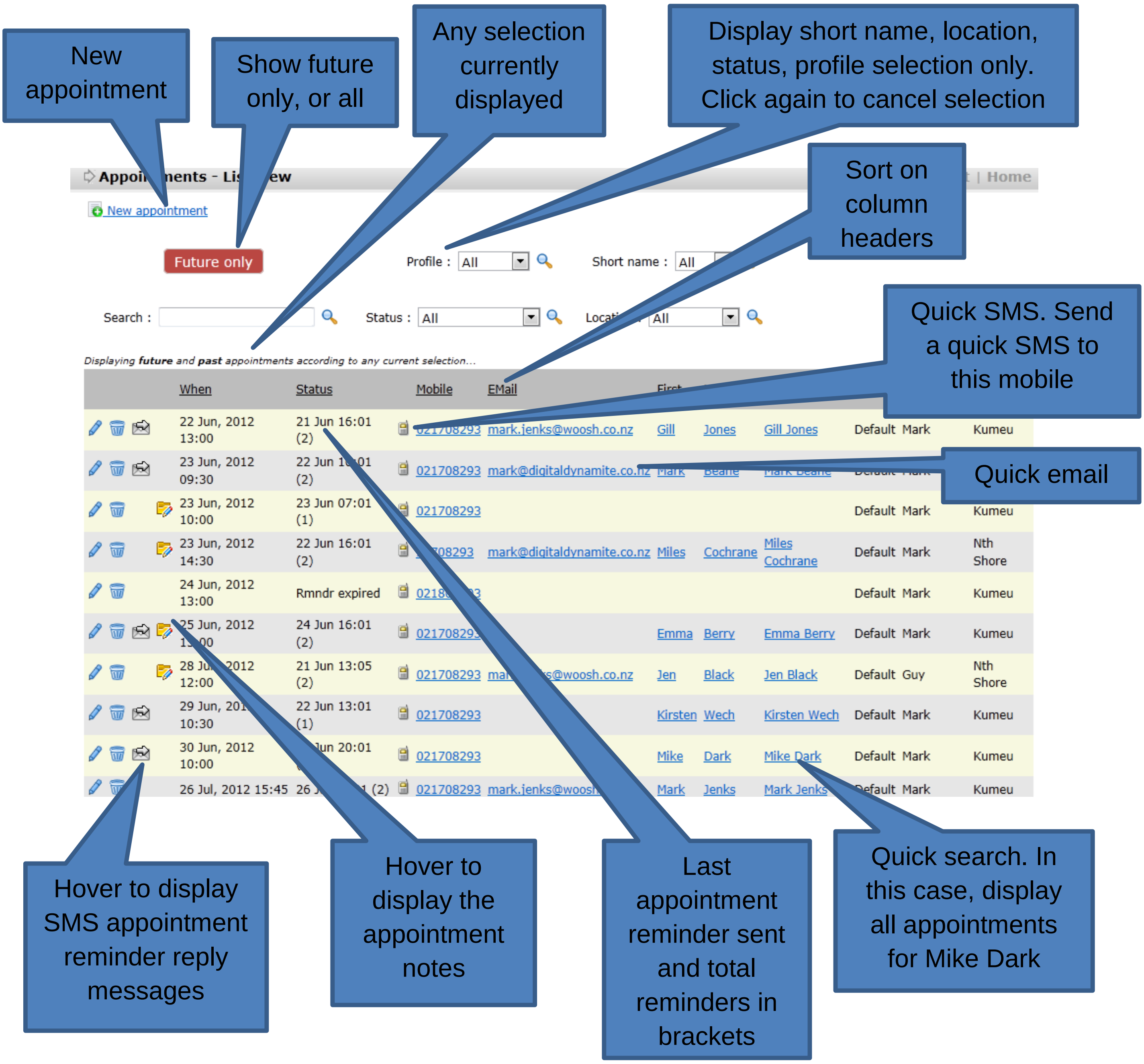


The rest of this document will acquaint you with Easy Message Pro feature set.

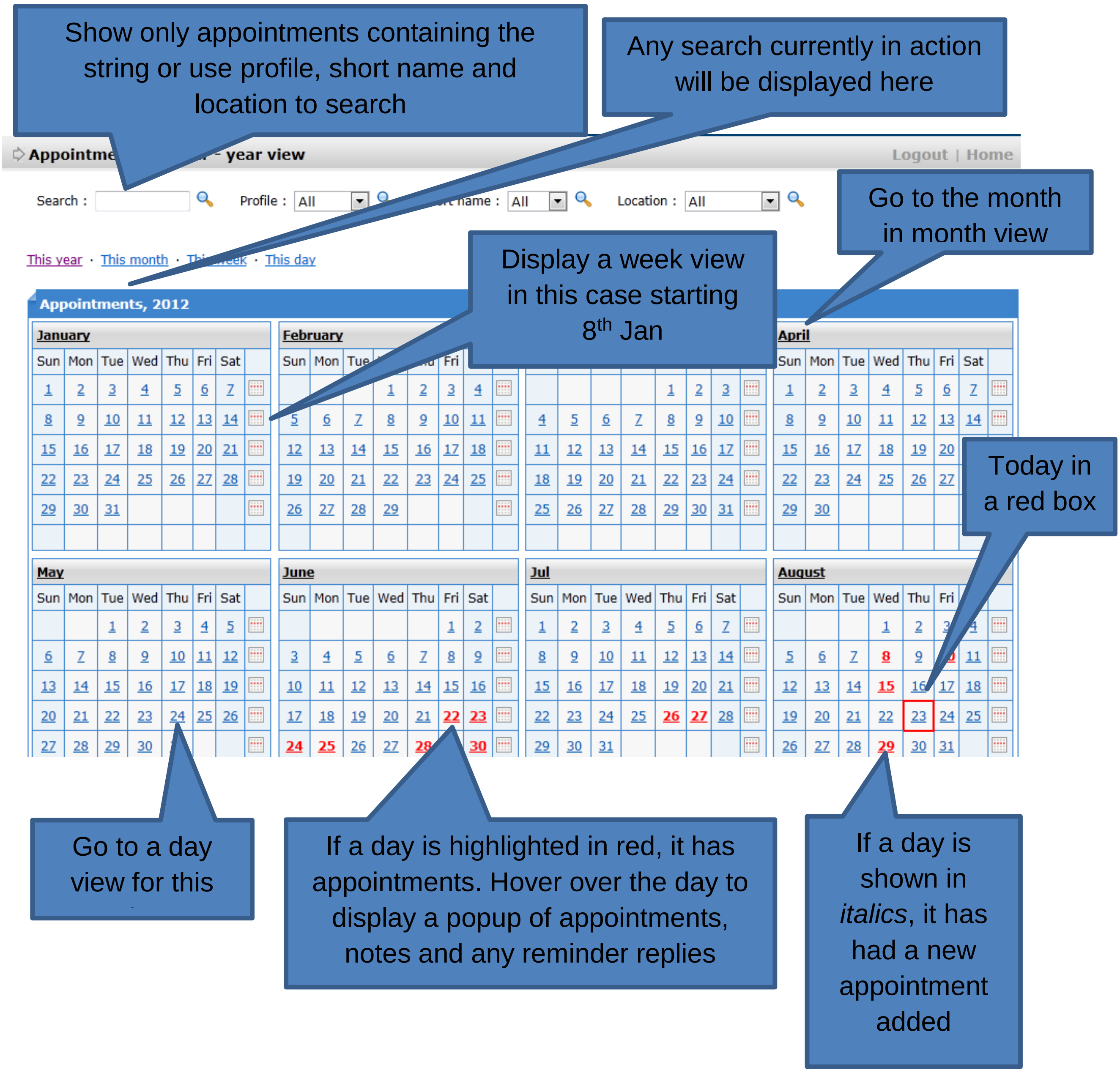
Calendars, appointment reminders and appointments

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.

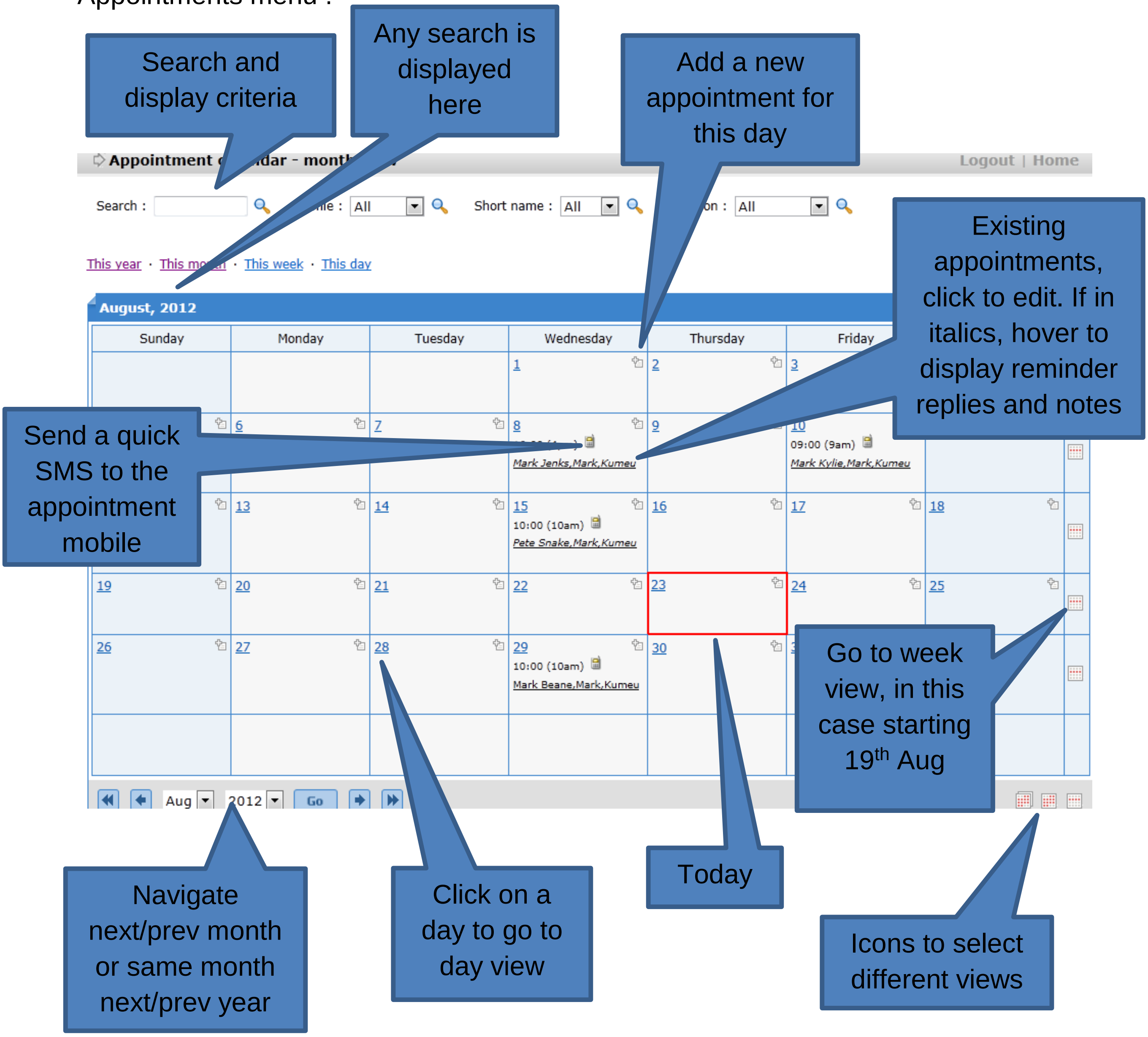
First the appointments list view :



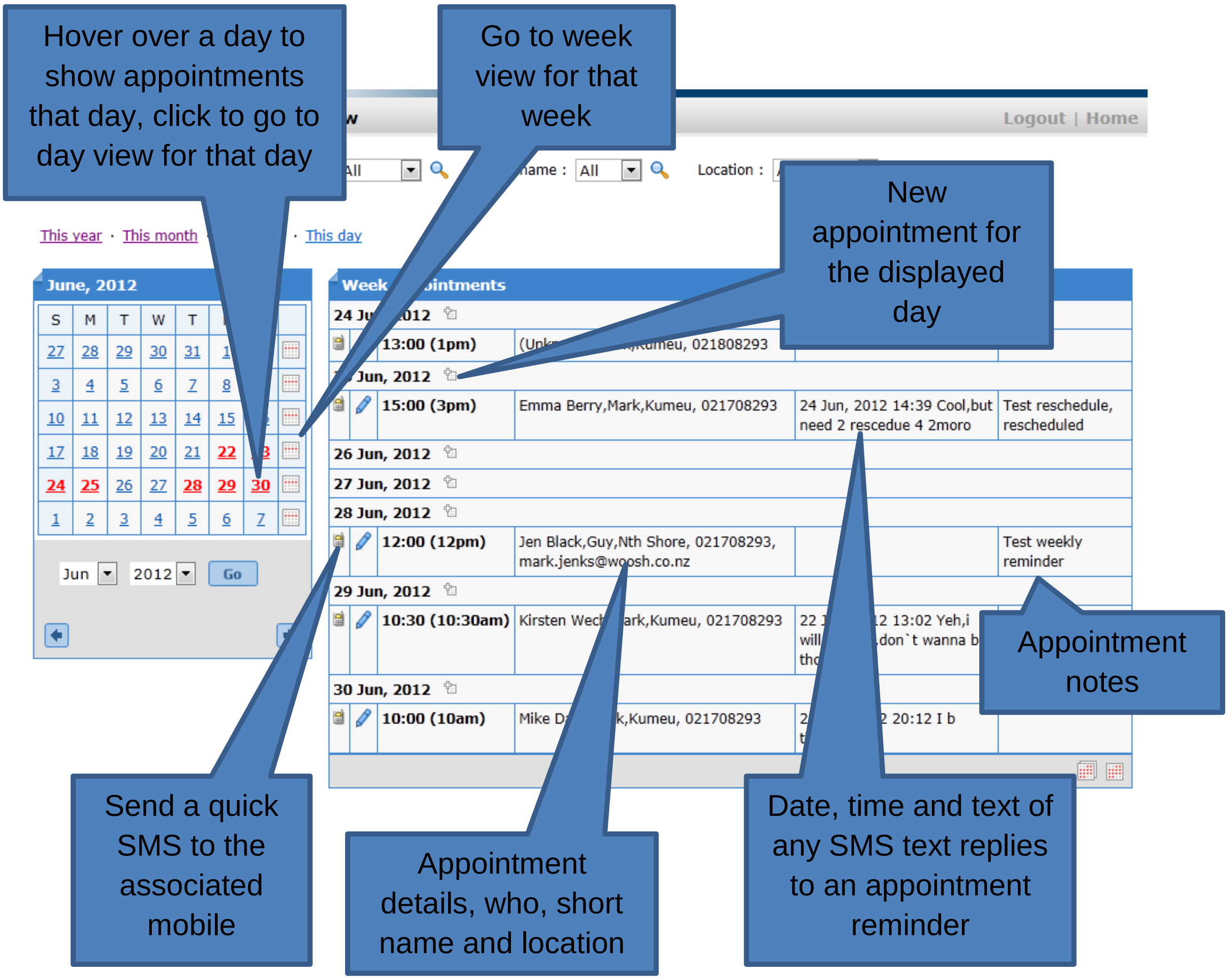
And now the calendar views, yearly, monthly, weekly and daily. Yearly first :



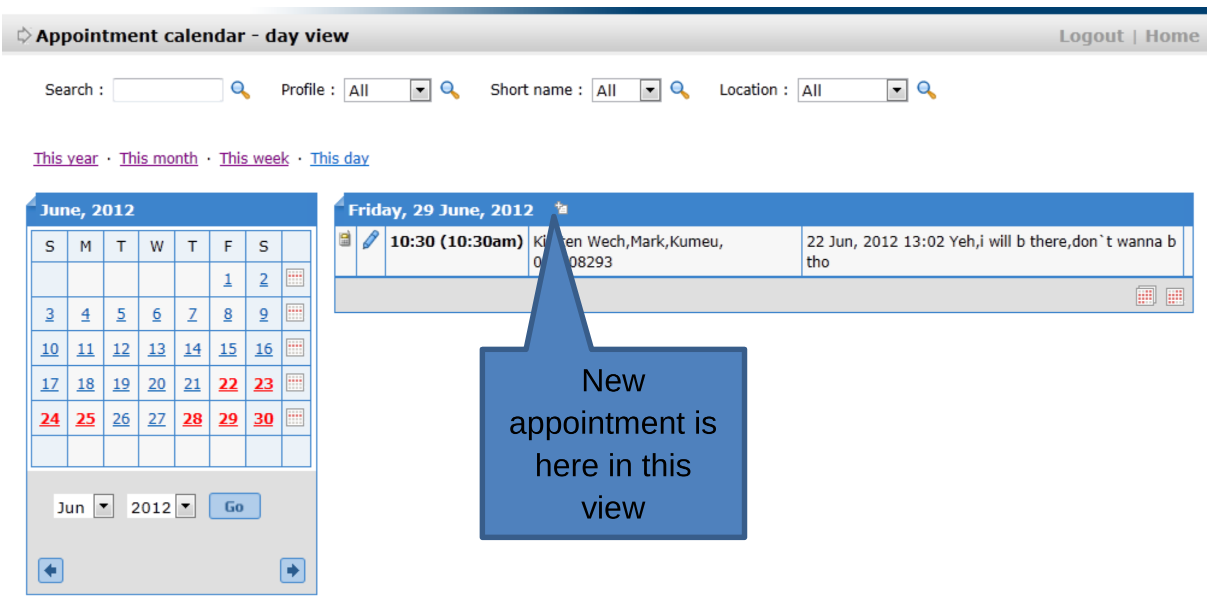
And here is the monthly calendar, the default when choosing Calendar from the Appointments menu :



And a week view :



And the day view :

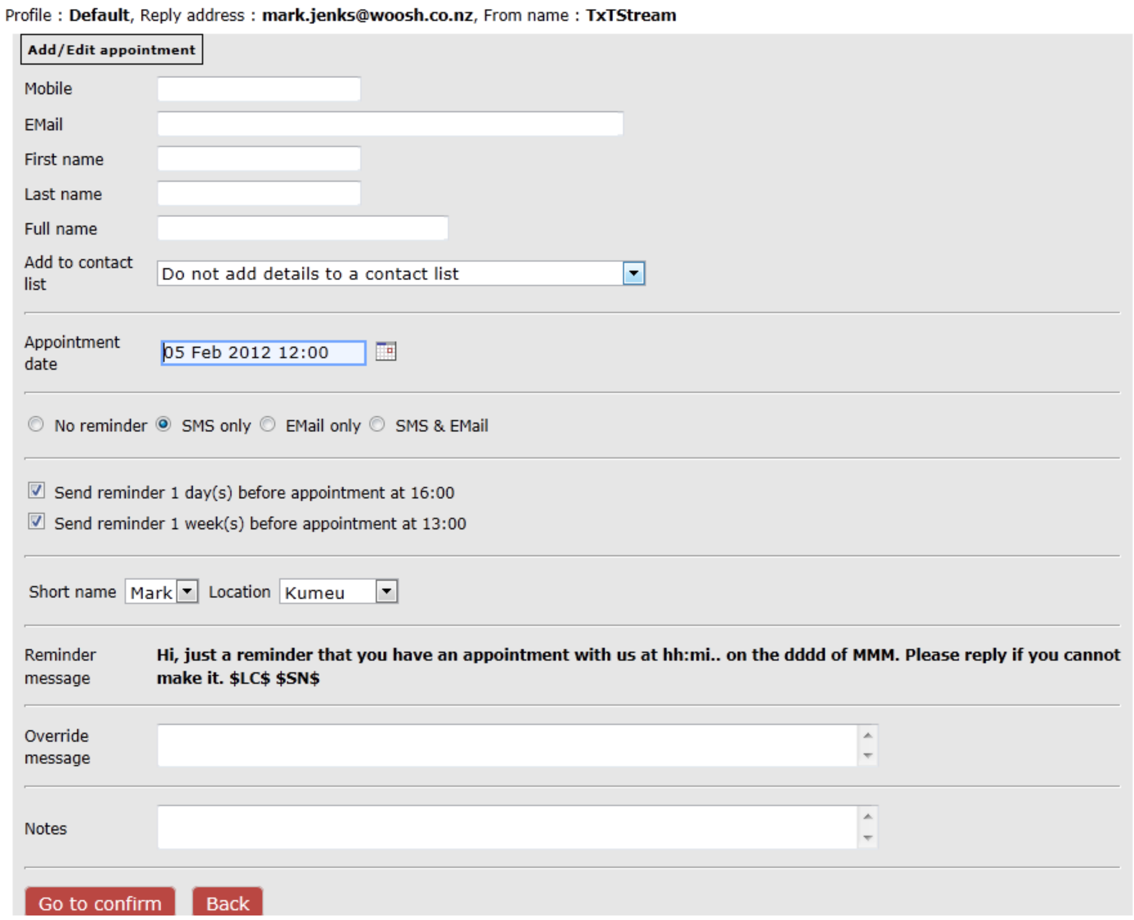


Creating and editing appointments

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 :



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.

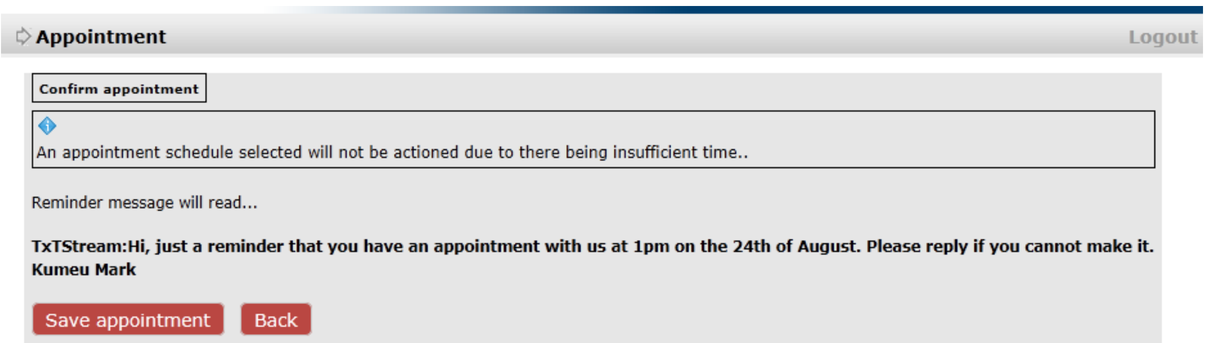
You may change the profile’s short name and location. The short name and location are used in two ways. Firstly, they provide a means to categorize or select a set of appointments in the calendars and appointments list view e.g. see only appointments for Gill, or only appointments for Albany. Secondly, 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.

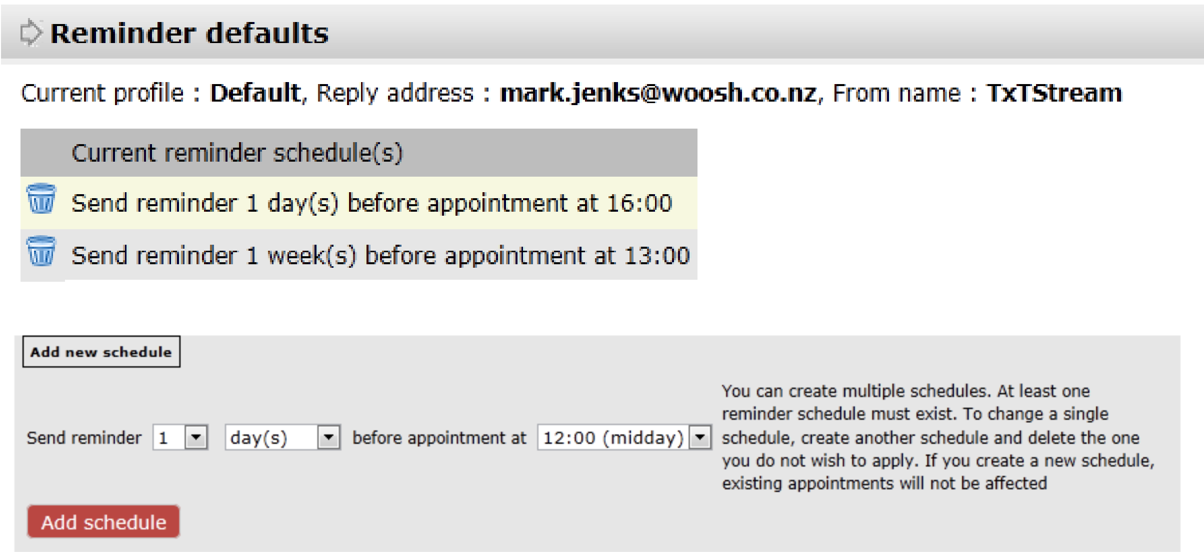
Setting up appointment reminders and schedules

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.

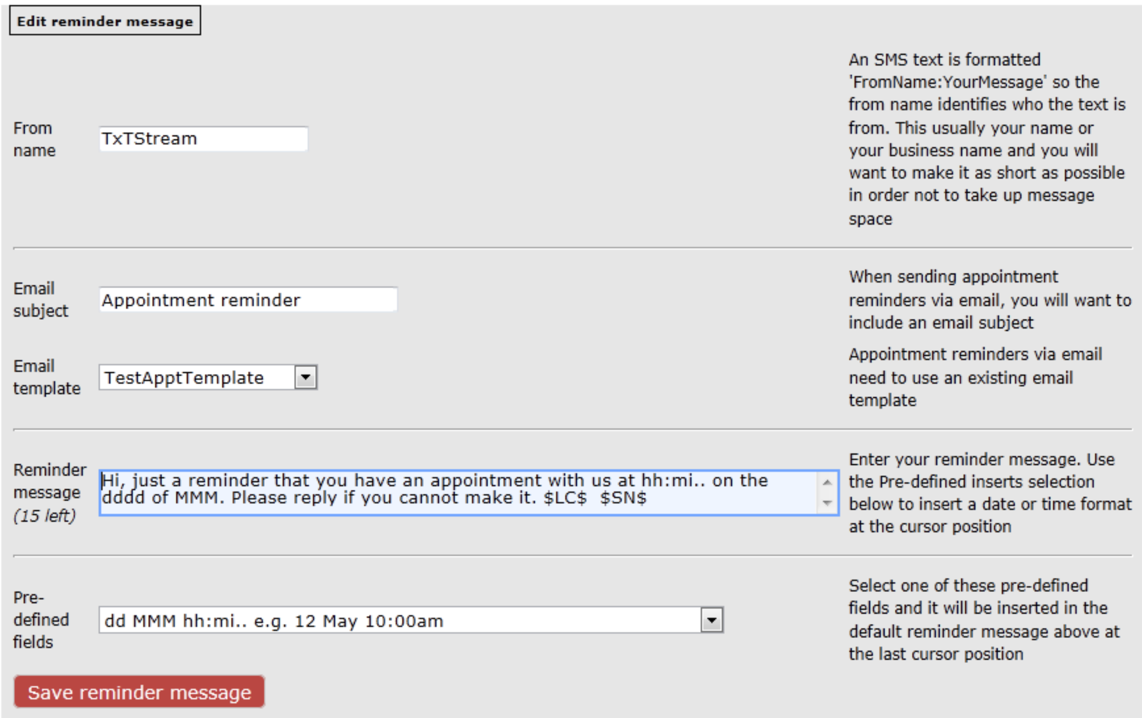
The reminder defaults page actually has four sections to it, current schedules, reminder defaults, adding a schedule and testing your reminder message. To keep things simple here we will treat it as three separate pages. First let's look at appointment reminder schedules :



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 :



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 :

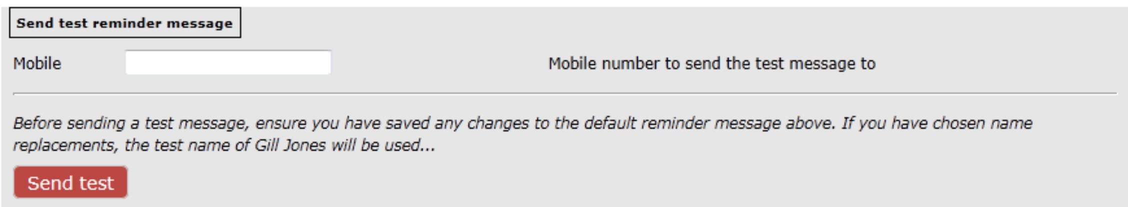
```
dd MMM e.g. 12 May
dd MMM hh:mi.. e.g. 12 May 10:00am
dd/mm/yyyy e.g. 12/06/2013
DDD,MMM dd hh:mi.. e.g. Tue,Feb 10,10:30am
DDD e.g. Tue
dddd e.g. 1st, 2nd, 3rd etc.
dd/mm/yyyy hh:mi.. e.g. 12/06/2013 10:00am
dd MMM hh:mi e.g. 12 May 15:00 (24 hr clock)
dd/mm/yyyy hh:mi e.g. 12/06/2013 15:00 (24 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 :

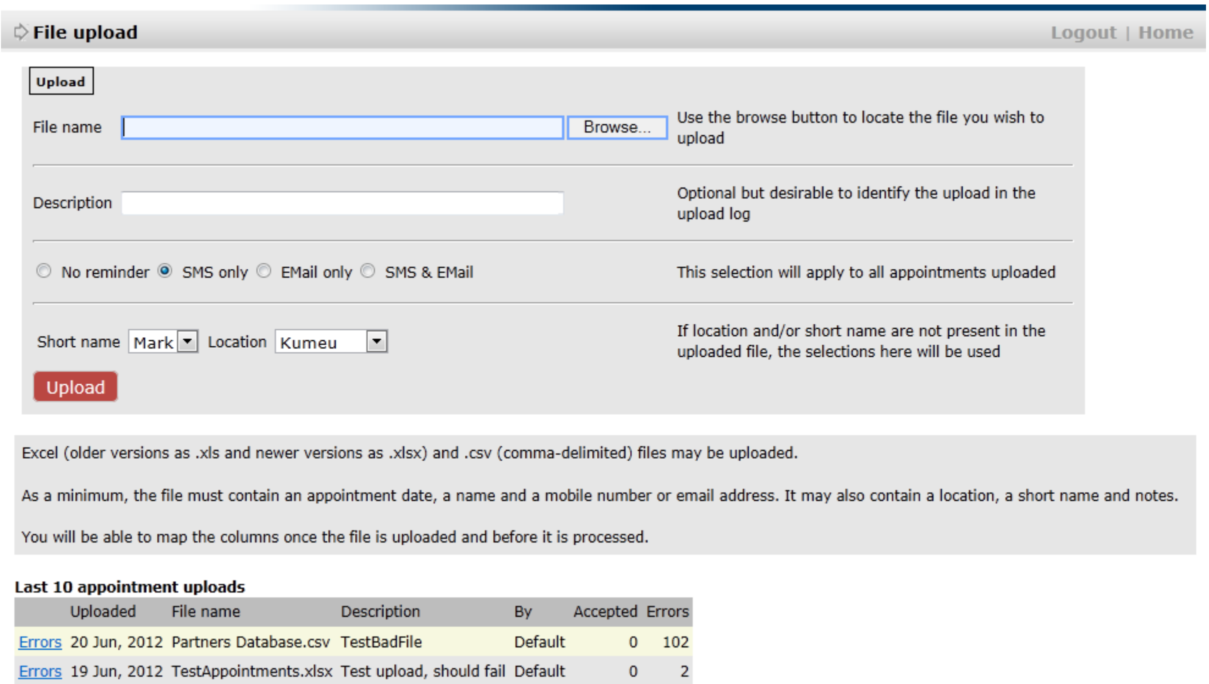


Simply enter the mobile number you wish to send the test to, and you will receive the test message. The system will perform any parameter replacements and send a test message using test data.

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 :



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 :

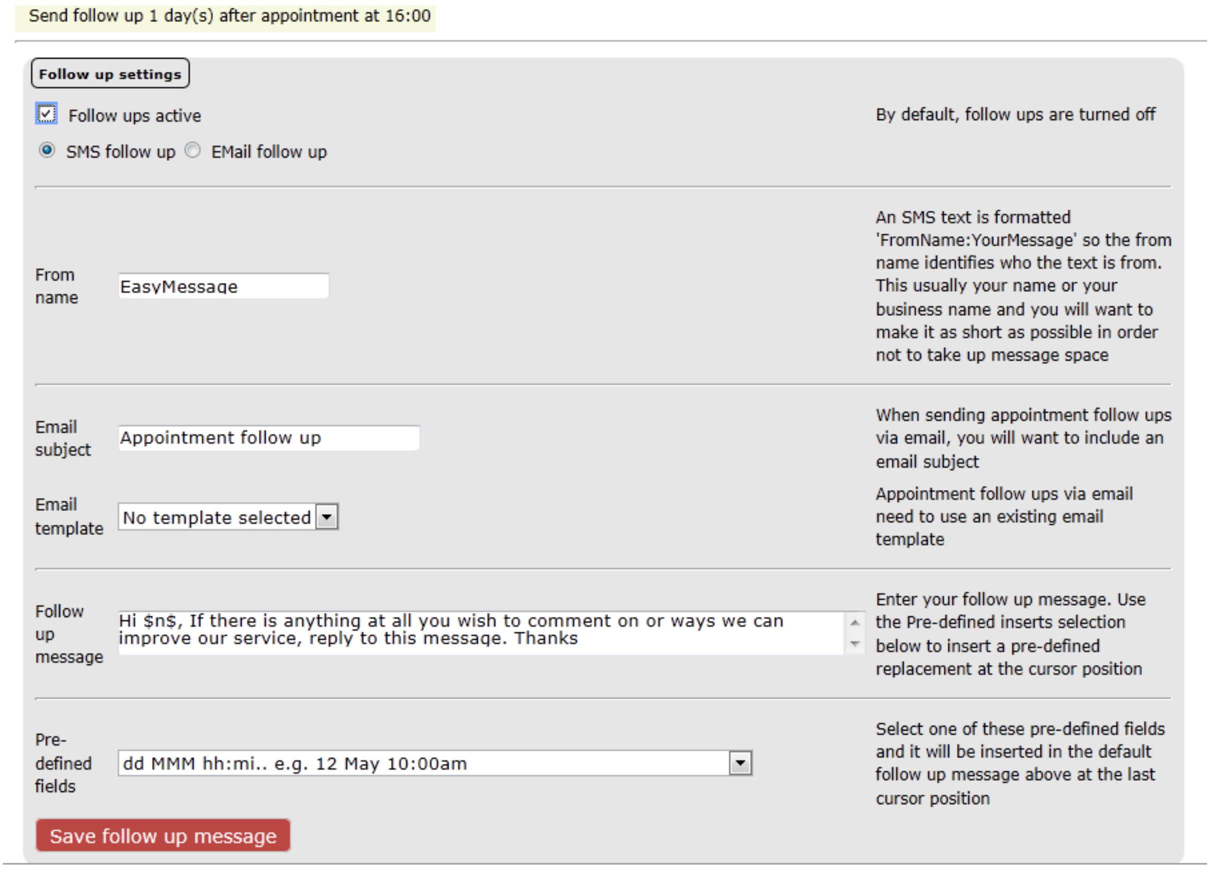
- Send a follow up a day after an appointment or event, asking the recipient to reply if there was anything they were unhappy about or any ways a service or product could be improved
- Send a follow up SMS text six months after a car service, asking the recipient if they wish to book another service. 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 :



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.

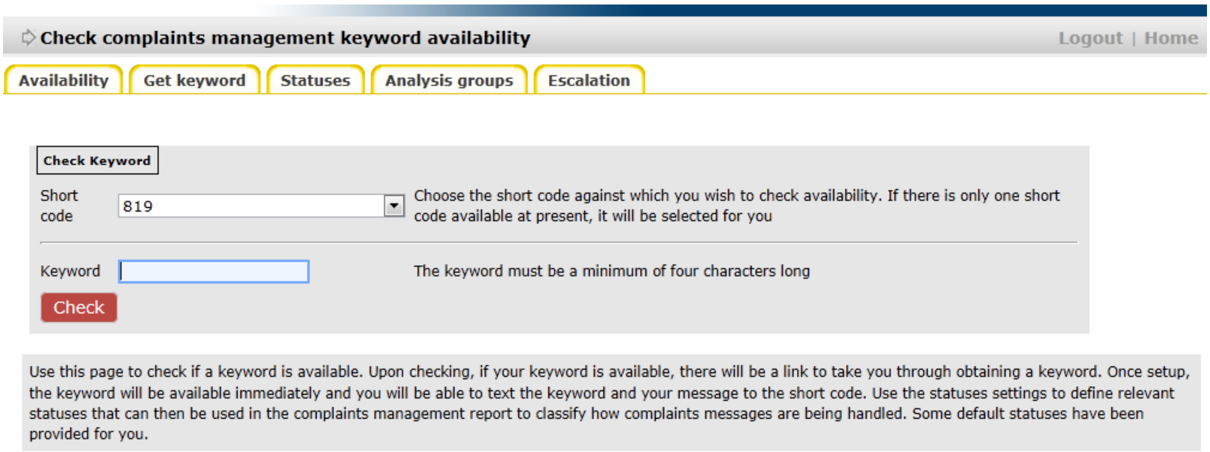
Positive word-of-mouth communication by customers and clients to friends, acquaintances and family is an effective way to grow a business. Being able to turn a dissatisfied customer or client into a promoter of your business or service requires that any complaints or niggles are dealt with effectively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

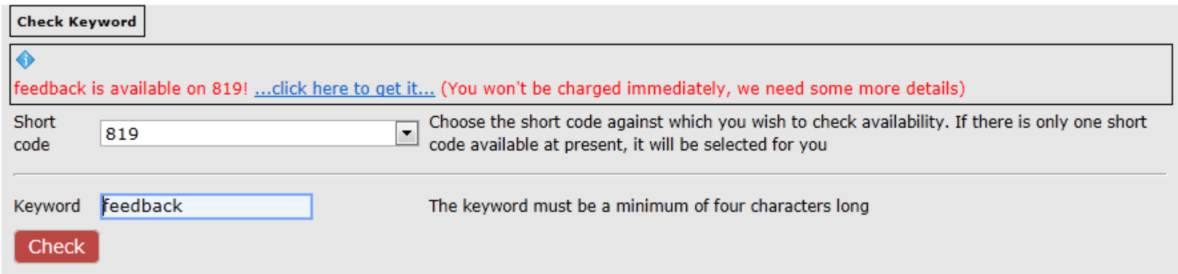
How does complaints management provide feedback? With complaints management, you can choose a keyword, and then let your clients and customers text their comments to you using that keyword, from their mobile. Let’s say that you chose the keyword ‘feedback’. After letting your clients and customers know 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.

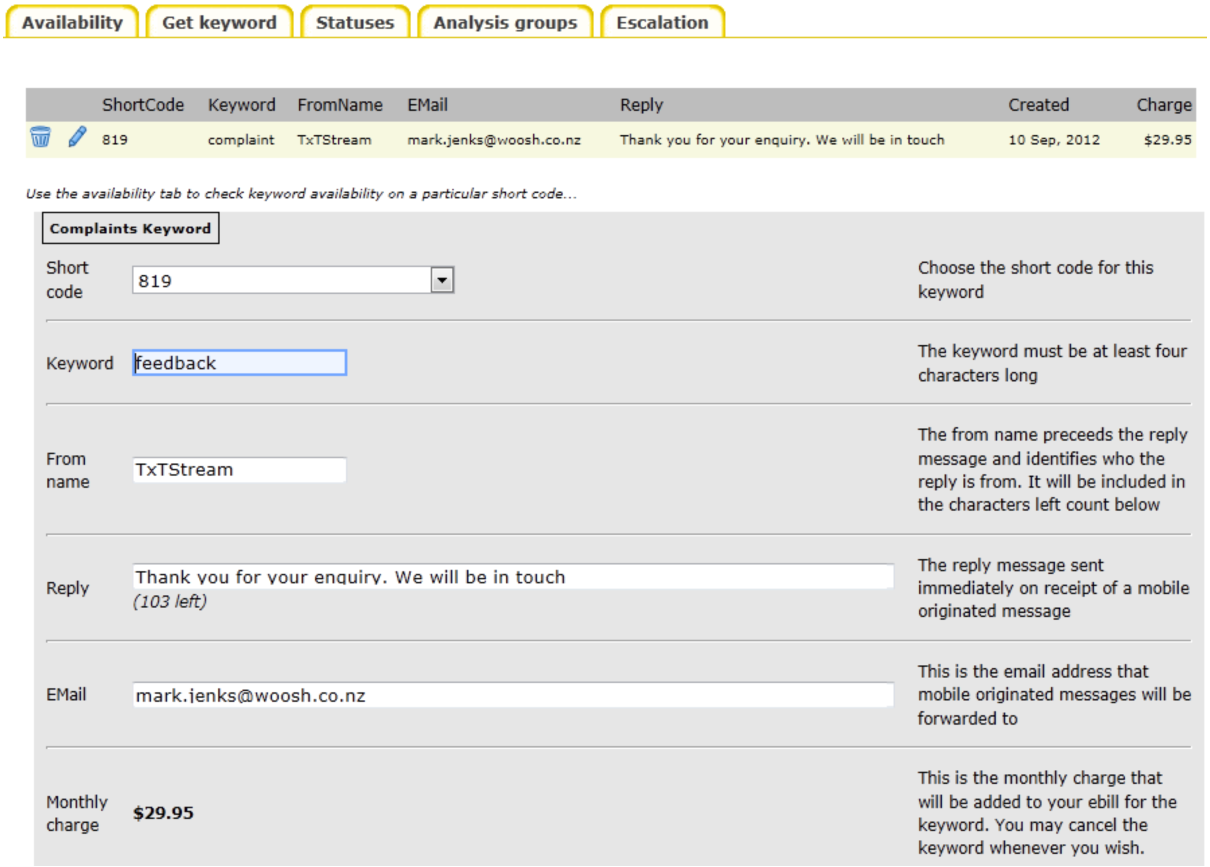
Getting a keyword



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 :



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 :

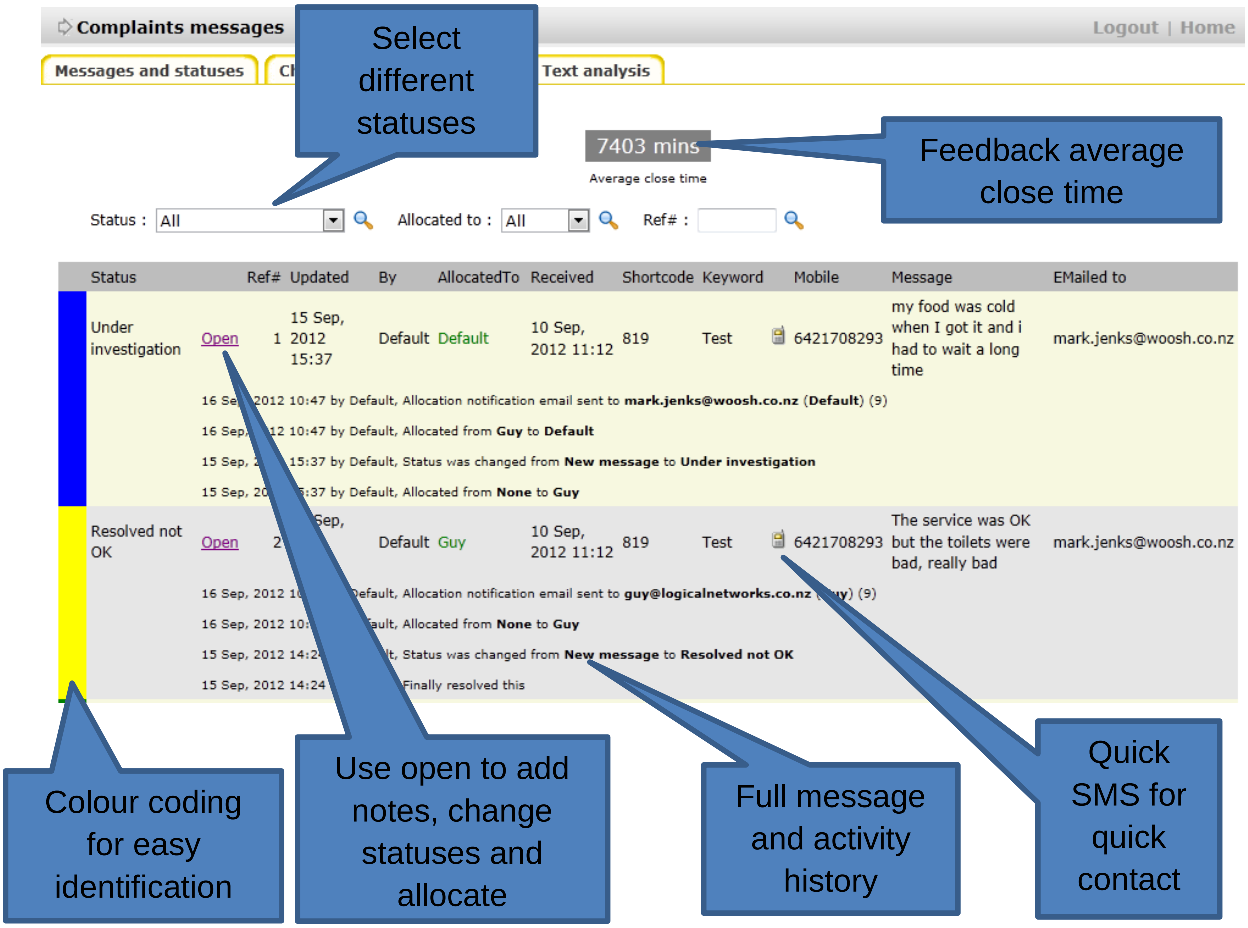


The fields are explained on the page. Once you have a keyword, it is available immediately. If your keyword was for example **feedback**, your clients and customers can text from their mobile phone something like :

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.

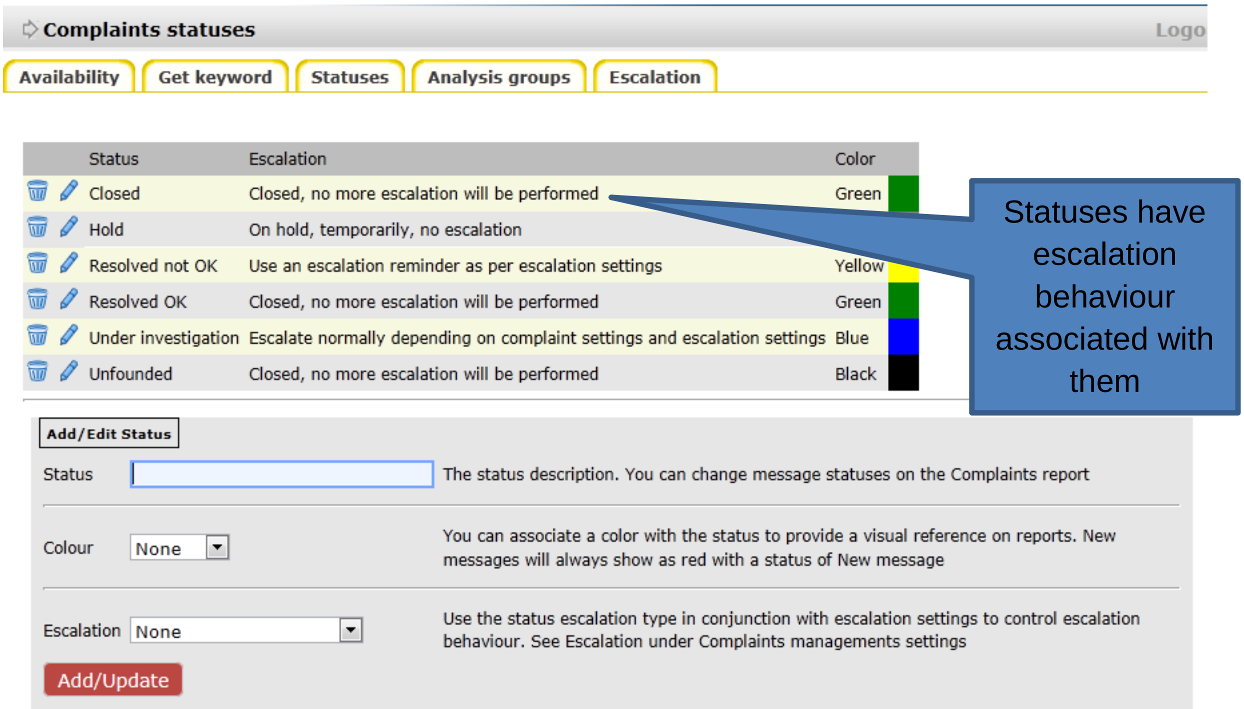
The system will do two things with the mobile originated message. First, it will send an email to the designated email address as per the page above. Then it will create a new item in the complaints management system. Before we cover off the Status, Analysis groups and Escalation items we can see on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



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

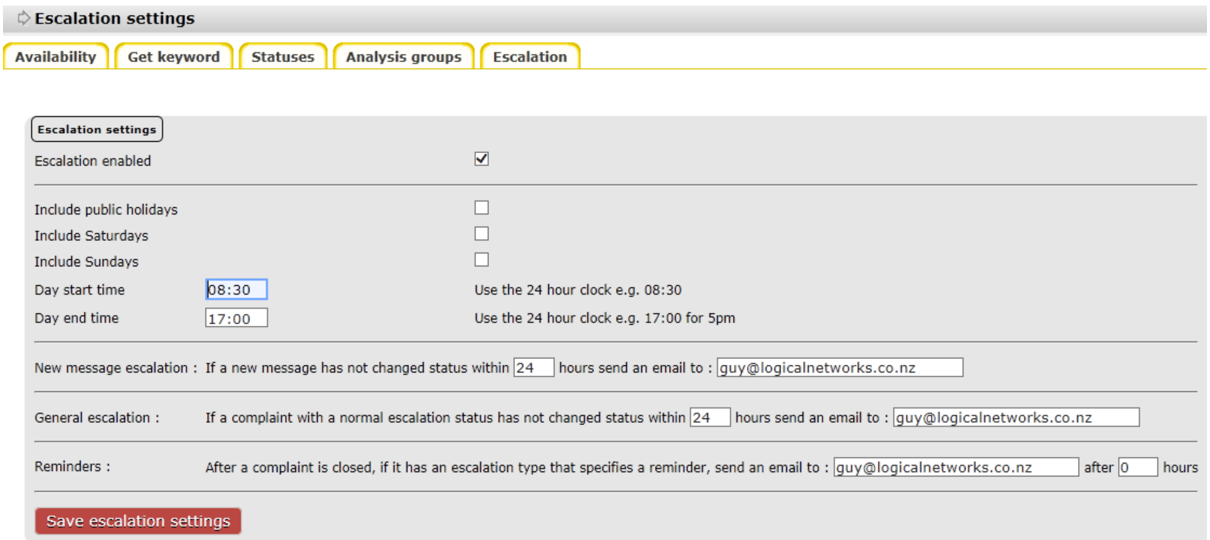
Any messages received will initially be created in complaints management with a status of new message and an identifying colour of red. Upon subscribing to Easy Message, the system will have set up some default statuses for you. You can edit the system provided statuses and add your own. Here is the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



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 :



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.

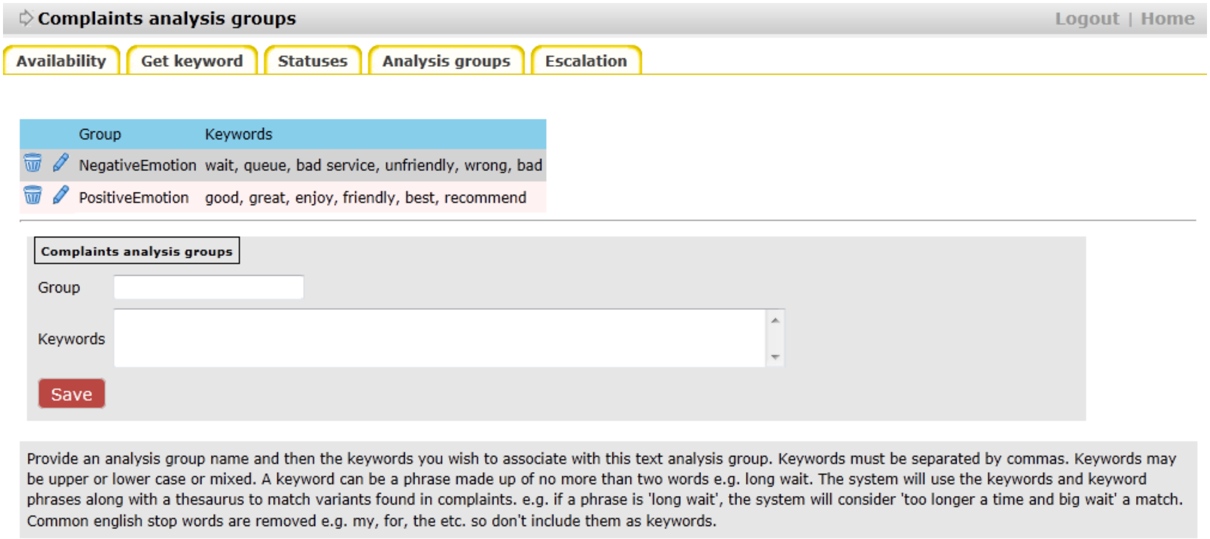
Keep in mind that statuses interact with escalation e.g. a status may be defined as an on hold escalation type status and so any escalation would be disabled while that status is associated with the feedback or complaints item.

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 :



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.

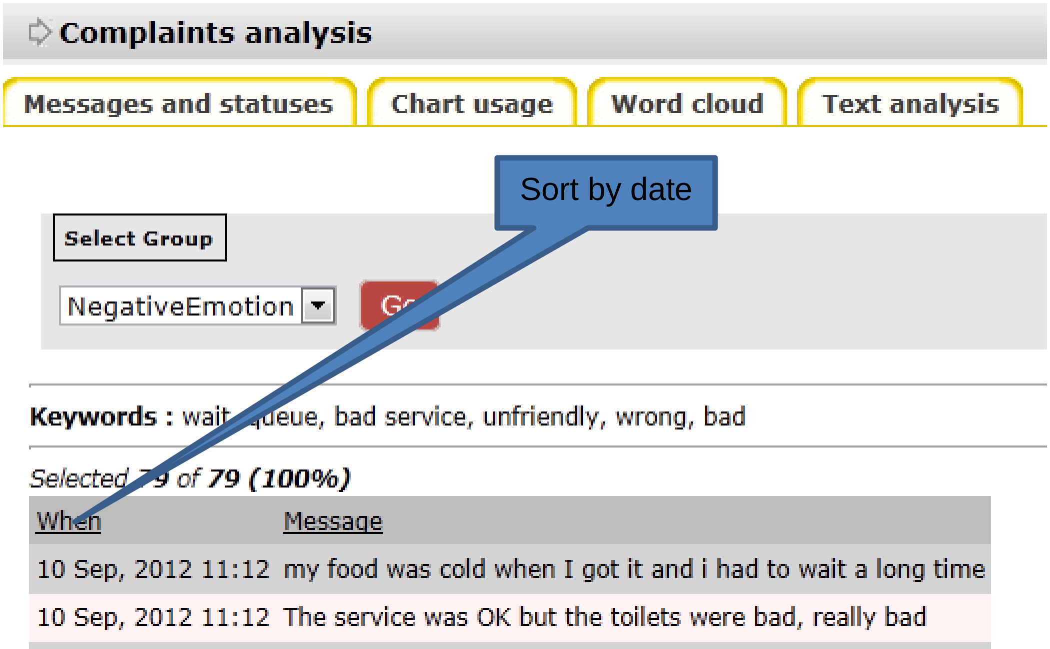
The system also uses a near word match. What this means is that if you provide a phrase e.g. ‘burnt coffee’ the system will consider all of the following examples a match :

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 :



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 :

Complaints word cloud

Messages and statuses | Chart usage | Word cloud | Text analysis

Click on a word to view messages...

Clicking on a particular word will display a page with associated comments and with the word highlighted in the message :

Messages and statuses | Chart usage | Word cloud | Text analysis

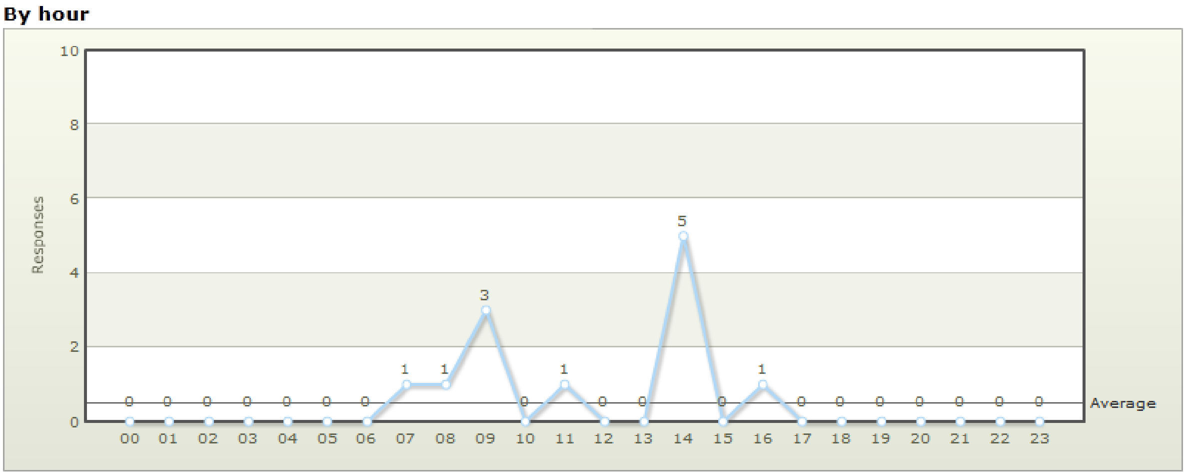
Back to word cloud

Word selection : **wait**

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

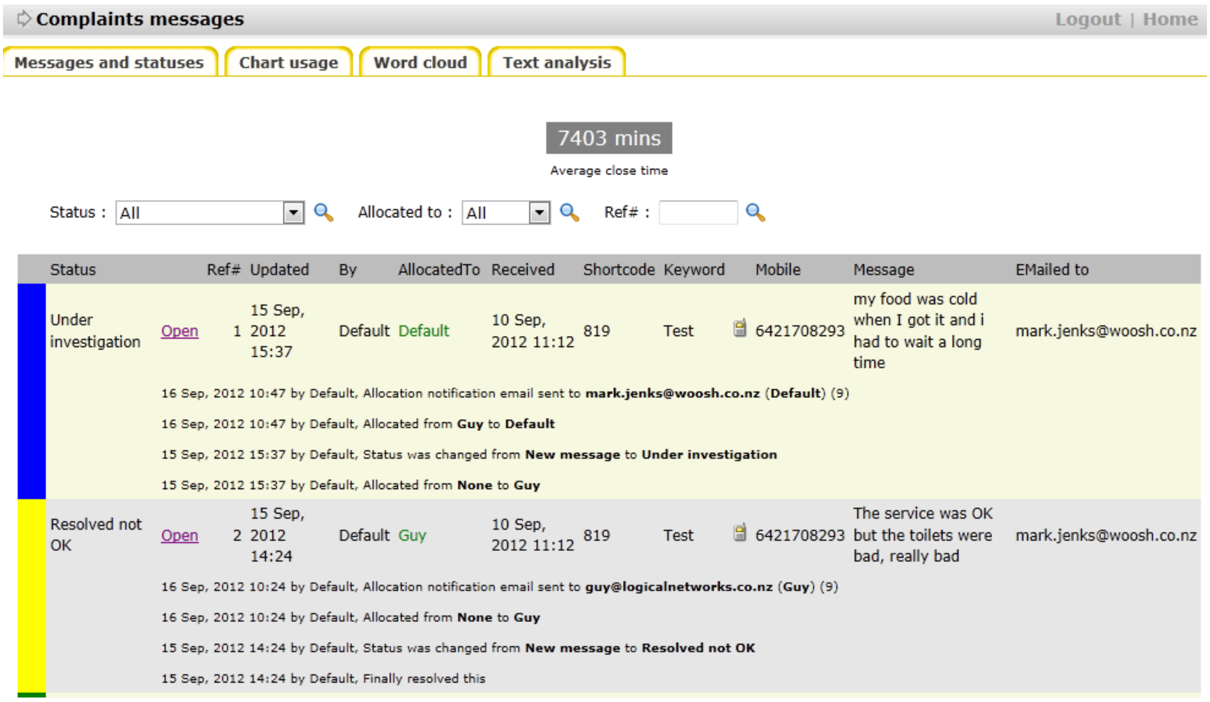
Usage charts

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 :

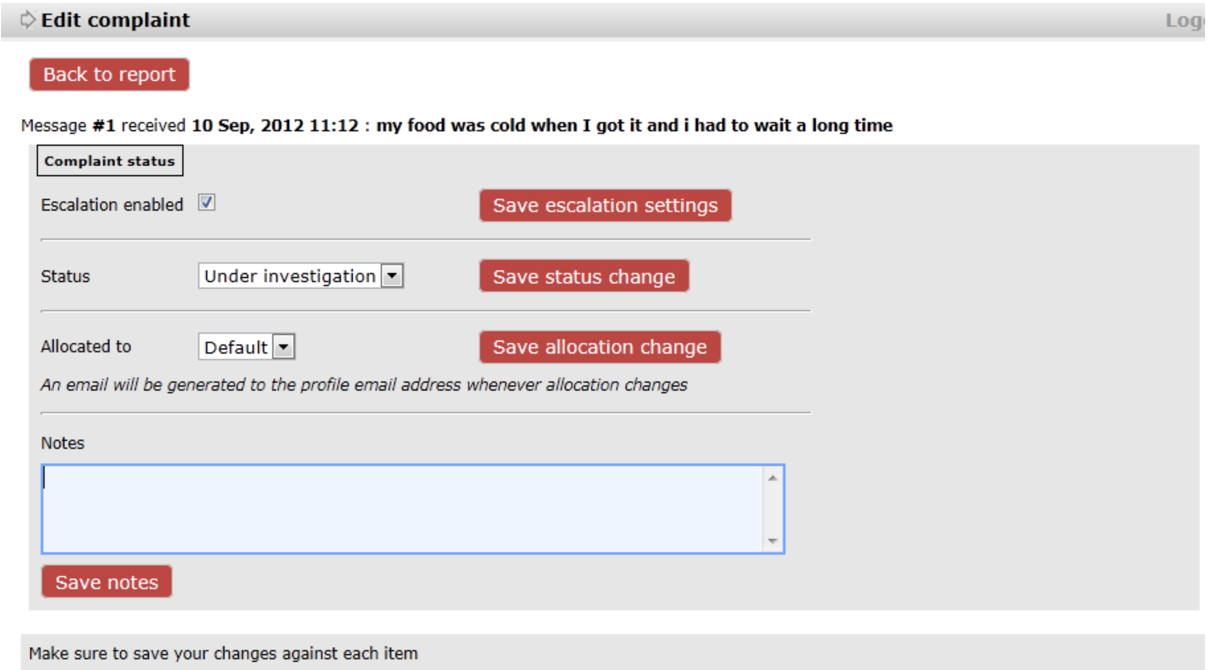


Managing a complaint

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 :



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 :



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*

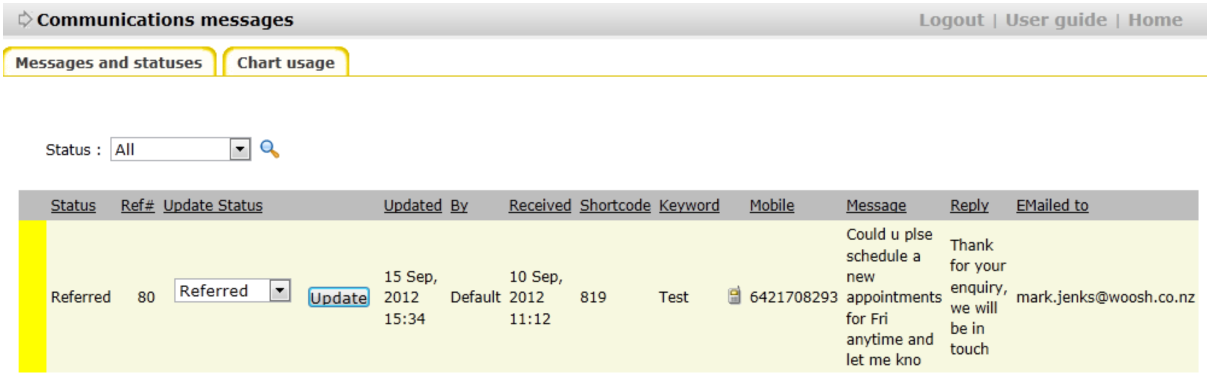
There are many advantages to this approach. The client gets immediate feedback via a reply message or a tailored reply message depending on message content. It's an effective way to become 'top of mind'.

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 :



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

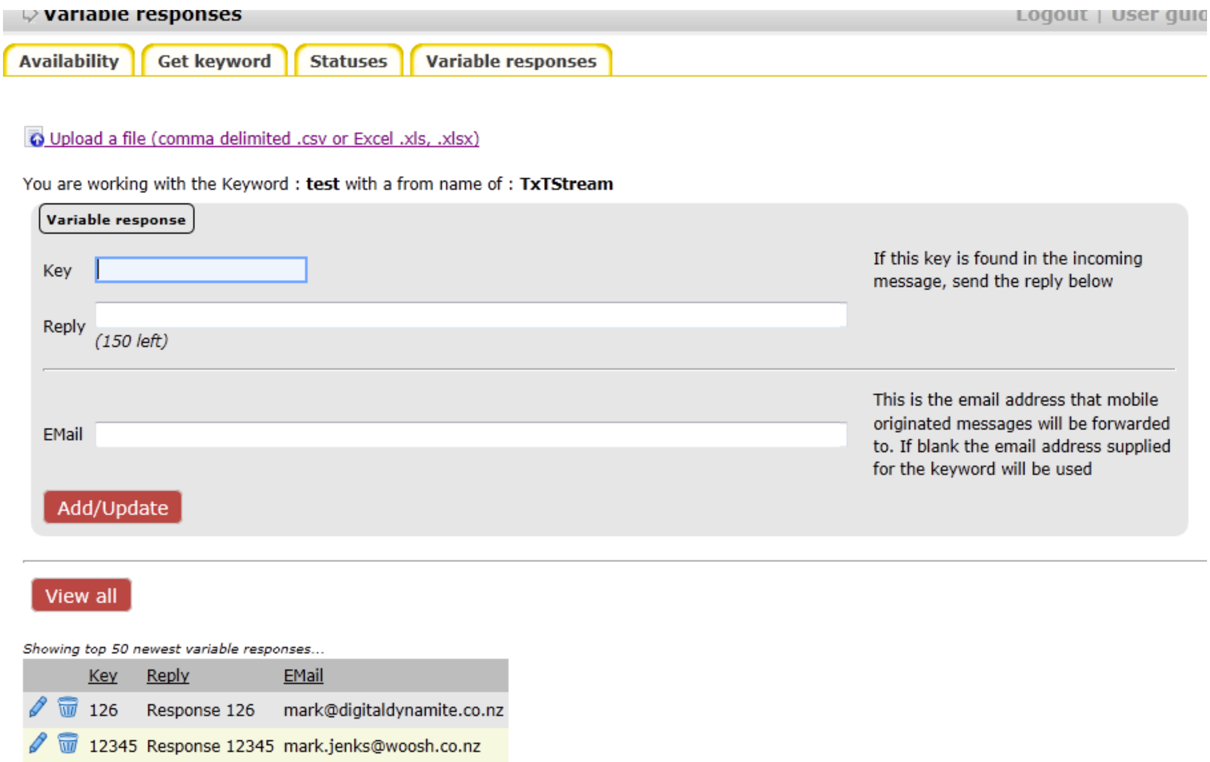
The quick SMS icon allows you to SMS text back a message from this page.

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 :



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.