



## **Text Messaging Application User Guide**

Financial Opportunity Center LOCAL INITIATIVES SUPPORT CORPORATION

# mogli

### Table of Contents

| Text Messaging Application User Guide | 0 |
|---------------------------------------|---|
| Intended Uses and Samples:            | 2 |
| Sample "Welcome Template":            | 2 |
| Application Features:                 | 2 |
| Application Requirement:              | 2 |
| Opt-out Key Words:                    | 2 |
| List of Phone Numbers:                | 3 |
| Conversational 1-on-1 Texting:        | 4 |
| SMS Templates:                        | 4 |
| SMS List Views:                       | 6 |
| Bulk SMS:                             | 6 |
| Bulk Messaging Reports:               | 8 |

#### Intended Uses and Samples:

#### Individual appointments and reminders.

<u>Sample:</u> [FOC Name]: Reminder! Your appointment with [Coach Name] is tomorrow at [Enter time]. To reschedule or cancel, please call [Enter Number]

<u>Sample 2:</u> [FOC Name]: Hello [Client name], it's been 6 months since your last credit report review. Let's schedule an appointment. What is your availability next week? – Thanks, [Coach Name].

#### Individual communication of successes included increase in wages and job placement. Also, reminder to stay in touch with the coach.

<u>Sample:</u> [FOC Name]: Have you received a promotion or an increase in wages? Come and connect with us to talk about exciting new savings opportunities available to you. Please call [Enter Name] at [Enter number] to hear more.

<u>Sample 2:</u> [FOC Name]: Hello [Client Name], I'm completing a round of employment retention and I would like to confirm if you're still employed and/or if you need any assistance at this time. Feel free to reach me at [Coach Phone Number]. Thank you, [Coach Name].

#### General encouraging texts on financial topics.

<u>Sample:</u> [FOC Name]: Congratulations on building your credit! Please remember to use less than 30% of your total available credit to keep increasing your score.

<u>Sample 2:</u> [FOC Name]: Congratulation, you have successfully completed the Twin Account payments! Let's schedule a time to talk about your matched fund usage. – Thanks, [Coach Name].

#### Sample "Welcome Template":

Hello {{First\_Name\_x\_\_c}}, {{Home\_Site\_Name\_x\_\_c}} would like to send you text messages to stay in touch. You will be able to opt-out at any time. To opt-out reply STOP or END.

#### **Application Features:**

- Conversational 1-on-1 Texting: Send individual text messages via the "Conversation View" listed on both the "Contact" and "Case Record" tabs.
- **SMS Template:** Create custom templates for appointment reminders, retention verification, etc.
- Bulk SMS: Send mass text messages to a group of clients.

Application Requirement: Client mobile number for the "Mogli Number". <u>Tip</u>: If a client is missing the "Mogli Number" either on the "Case Record" or "Contact" click on "Edit" and "Save" to re-trigger the number.

Opt-out Key Words: A client can reply with any of the following words to opt out of receiving messages:

- Stop
- Unsubscribe
- End
- Quit
- Cancel

List of Phone Numbers: Below you will find the phone number assigned to your Salesforce user account

#### based on your location.

| #  | Location                  | Phone Number   |
|----|---------------------------|----------------|
| 1  | Atlanta                   | (470) 684-3992 |
| 2  | Boston                    | (857) 524-9577 |
| 3  | Bozeman                   | (406) 295-1648 |
| 4  | Chicago                   | (773) 661-4962 |
| 5  | Cincinnati                | (513)216-8028  |
| 6  | Connecticut               | (860) 499-3396 |
| 7  | Detroit                   | (313) 513-1511 |
| 8  | Duluth                    | (218) 217-9975 |
| 9  | Elkins                    | (304) 467-4330 |
| 10 | Flint                     | (810) 641-1977 |
| 11 | Gate City                 | (276) 250-9565 |
| 12 | Hampton Roads             | (757) 255-7532 |
| 13 | Hilo                      | (808) 353-5685 |
| 14 | Houston                   | (281) 524-2956 |
| 15 | Huntington                | (260) 217-6048 |
| 16 | Indianapolis              | (317) 350-1540 |
| 17 | Jacksonville              | (904) 320-0991 |
| 18 | Kalamazoo                 | (269) 225-0434 |
| 19 | Kansas City               | (816) 323-6800 |
| 20 | Kingsport                 | (423) 295-9142 |
| 21 | Los Angeles               | (213) 376-3897 |
| 22 | Milwaukee                 | (414) 246-5478 |
| 23 | Monroe                    | (318) 232-6712 |
| 24 | Newark                    | (973) 221-9572 |
| 25 | NYC                       | (516) 453-9268 |
| 26 | Peoria                    | (309) 220-3373 |
| 27 | Philadelphia              | (267) 356-4224 |
| 28 | Phoenix                   | (602)806-1434  |
| 29 | Pittsburg                 | (412) 274-5136 |
| 30 | Rhode Island - Providence | (401) 208-2302 |
| 31 | Richmond VA               | (804) 568-8535 |
| 32 | Roseburg                  | (541) 313-3874 |
| 33 | Rutledge                  | (865) 205-6084 |
| 34 | San Diego                 | (619) 567-1768 |
| 35 | San Jose                  | (408) 418-2346 |
| 36 | Tacoma                    | (253) 352-2764 |
| 37 | Toledo                    | (419) 614-6591 |
| 38 | Twin Cities, MN           | (651) 299-6503 |
| 39 | Uniontown, PA             | (724) 204-6765 |
| 40 | Western New York          | (716) 271-2767 |

#### Conversational 1-on-1 Texting:

- 1. Start by searching for your client's name using the search box Search...
- 2. Navigate to the client's "Case Record" or "Contact" record. *Note:* the app is standard on the "Contact" record and a second conversation view was created for the FOC on the "Case Record".
- 3. Scroll down to the "Mogli Conversation" section, start typing the message, and once completed click the "Send" icon (paper plane).
- 4. To use a SMS template, select the template name form the dropdown list. You will learn how to setup a template in the next section (optional).
- 5. To schedule a message to go out at a later time, select the date and time (optional). Click on the paper plane to schedule the message.

| Mogli     |   |        |
|-----------|---|--------|
| <b>\$</b> | INTELLIGENT TEN MERAZINA  |        |
|           | December 9  |        |
|           |   | - U    |
| Hello Yol | anda - this is Carolina and I'm completing a round of employment retention. Are you still working? Is there any support I can offer at this time? |        |
|           | (773) 207-6760 - Dec 09, 2020 - 2:45 PM   | _      |
| Hello Lis | a - this is Carolina and I'm completing a round of employment retention. Are you still working? Is there any support I can offer at this time?    |        |
|           | (773) 207-6760 - Dec 09, 2020 - 2:45 PM   |        |
|           | December 10   |        |
|           |   |        |
|           |   |        |
| Hi Yoland | da. It's time to review your semi-annual credit report. Are you free for a video call?  |        |
| Hi Yolan  | Ta. It's time to review your semi-annual credit report. Are you free for a video call?  | 1      |
|           | (773) 207-6760 - @ Dec 10, 2020 - 11 45 AM  | 1<br>[ |
|           | e to review your semi-annual credit report. Are you free for a video call?  | acter  |
|           | (773) 207-6760 - @ Dec 10, 2020 - 11 45 AM<br>e to review your semi-annual credit report. Are you free for a video call?<br>494 chare             | acte   |

#### SMS Templates:

- To create a custom template start by clicking on the "SMS Template" tab SMS Template and then click on "Create New SMS Template" Create New SMS Template".
- 2. Give your template a descriptive name and type in your messages. For example, "Congratulation, you have successfully completed the Twin Account payments! Let's schedule a time to talk about your matched fund usage.".
- 3. Skip the "Form Template" lookup filed and click on the "Save" button



| SMS Template | Edit         | Save Save & New Cancel   |                        |
|--------------|--------------|--|------------------------|
| Information  |              |  | = Required Information |
|              | Name<br>Text | Twin Account Completion Owner User B Congratulation, you have successfully completed the Twin Account payments! Let's schedule a time to talk about your matched fund usage. | Q.                     |
|              |              | Save Save & New Cancel   |                        |

Tip: Template Merge fields - You can also create messages that auto-populate with specific client details such as their name, their FOC coach name, the number of days since their last budget, etc., using "merge fields". To do so, simply copy and paste the merge field into your message. Make sure that the field you would like to populate has data in it, otherwise it will appear blank. See below for a list of "merge" fields available for use. Note: These merge fields will only work when sent from the case record.

| Field Name                                  | Merge field                                 | Example text         |
|---|---|----------------------|
| Home Site                                   | {{Home_Site_Name_xc}}                       | Breakthrough – Urban |
| Client                                      | {{Namec}}                                   | Jackie Fake          |
|   | {{First_Name_xc}}                           | Jackie               |
|   | {{Last_Name_xc}}                            | Fake                 |
| # of days since last<br>(attempted) contact | {{of_days_since_last_attempted_contactc}}   | 88                   |
| No. of days since last<br>Financial Health  | {{No_of_days_since_last_Financial_Healthc}} | 80                   |
| No. of days since last<br>Budget            | {{No_of_days_since_last_Budgetc}}           | 30                   |
| No. of days since last Credit<br>Report     | {{No_of_days_since_last_Credit_Reportc}}    | 180                  |
| No. of days since last<br>Balance Sheet     | {{No_of_days_since_last_Balance_Sheetc}}    | 30                   |
| Emergency Cash Assistance<br>Survey ID      | {{Emergency_Cash_Assistance_Survey_IDc}}    | 241791               |
| Enrolled Date                               | {{Enrolled_Datec}}                          | 6/4/2019             |
| Career Coach                                | {{Career_Coach_Namec}}                      | Melinda Carmichael   |
| Financial Coach                             | {{Financial_Coach_Namec}}                   | Melinda Carmichael   |
| Income Support Coach                        | {{Income_Support_Coach_Namec}}              | Melinda Carmichael   |
| Employment Coach                            | {{Employment_Coach_Namec}}                  | Melinda Carmichael   |
| Other FOC Staff                             | {{Other_FOC_Staffc}}                        | Melinda Carmichael   |
| First Payment Date                          | {{First_Payment_Date_xc}}                   | 1/1/2019             |
| Maturity Date                               | {{Maturity_Date_xc}}                        | 2/1/2020             |

#### SMS List Views:

- 1. To view all messages, incoming, outgoing and scheduled to be sent, use the "SMS" tab.
- 2. To view just the message for your user select my incoming messages, my outgoing messages, my scheduled messages.

|          | ase<br>nanagement           | Search      |              | Search       |   |                         |                      |                   |             | Switch to Lightning Experience            | ECM -              |
|----------|-----------------------------|-------------|--------------|--------------|---|-------------------------|----------------------|-------------------|-------------|---|--------------------|
| Home     | Intake Entities Cont        | acts Client | Households   | Case Records | Groups & Classes                          | Reports SMS             | SMS Templates        | Bulk SMS          | +           |   |                    |
| <b>9</b> | sms<br>Home                 | _           |              |              |   |                         |                      |                   |             |   | Help for this Page |
|          |                             |             | Create New   | View         |   |                         |                      |                   |             |   |                    |
|          | All<br>My Incoming Messages |             |              | New          |   |                         |                      |                   |             |   | Recently Viewed V  |
| SMS N    | My Outgoing Messages        | hone Number | Direction St | atus Me:     | ssage                                     |                         |                      |                   |             |   | Created Dat        |
| SMS2     |                             | 18608612201 | Outgoing Se  |              | lo {{firstname}}, {{Homesit<br>DP or END. | te}} would like to send | you text messages to | stay in touch. Yo | u will be a | ble to opt-out at any time. To opt-out re | eply 1/8/2021      |
|          | Outgoing Messages           |             |              |              |   |                         |                      |                   |             |   |                    |
|          | Scheduled Messages          |             |              |              |   |                         |                      |                   |             | Compliance   Go to Salesforce mobile :    |                    |

#### Bulk SMS:

- 1. To send bulk text messages to a group of clients use the "Bulk SMS" tab Bulk SMS
  - a. Via search or via reports
    - i. <u>*Tip:*</u> If you're using both a report and search, load the report <u>first</u> and then add the remaining clients via search.
- 2. Select your message recipients:
  - a. Select either "Case Record" or "Contact"
  - b. Search for your client's name
  - c. Check the box next to your client's name and click on the "Add" button.

| not available | Report O<br>Search Report |
|---------------|---------------------------|
| ED Contact    | Q Search Report           |
| ecords        |                           |
| ecords        |                           |
|               |                           |
|               |                           |
|               | JKLMNOPQRSTUVWX           |
|               | ZALL                      |
|               | V Phone Number            |
| ake           | +17738350828              |
| da Smith      | +17738350828              |
|               |                           |

- 3. SMS Message:
  - a. Manually type in your message, or use a template (optional).
  - b. If applicable, schedule your message to go out at a later time
  - c. Click on the "Send" button

| support I can offer at this time? Number of Characters: 169 SMS Send Configuration Send From: (773) 207-6760 C Dec 15, 2020  |    | SMS Recipients                 |             |    |   |
|--|----|--------------------------------|-------------|----|---|
| SMS Message         SMS Template:       Merge Fields.         -None-       +None-         Hello ([Contact FirstName]) - this is Carolina and I'm completing a round of employment retention. Are you still working? Is there an support I can offer at this time?         Number of Characters: 169         SMS Send Configuration         Send From:       Schedule Message:         (773) 207-6760       \$ Dec 15, 2020   |    | <+17738350828>;<+17738350828>; |             |    |   |
| SMS Template:       Merge Fields:         -None-       -None-         Hello ((Contact FirstName)) - this is Carolina and I'm completing a round of employment retention. Are you still working? Is there an support I can offer at this time?         Number of Characters: 169         SMS Send Configuration         Send from:       Schedule Message:         (773) 207-6760       Dec 15, 2020  | I  | Number of Recipients: 2        |             |    |   |
| -None- <ul> <li>-None-</li> <li>Hello ((Contact FirstName)) - this is Carolina and I'm completing a round of employment retention. Are you still working? Is there an support I can offer at this time?</li> <li>Number of Characters: 169</li> <li>SMS Send Configuration</li> <li>Send From:</li> <li>Schedule Message:</li> <li>(773) 207-6760</li> <li>Context Configuration</li> <li>Context Configuration&lt;</li></ul> | SN | iMS Message                    |             |    |   |
| -NoneNoneNone- Hello ((Contact FirstName)) - this is Carolina and I'm completing a round of employment retention. Are you still working? Is there an support I can offer at this time? Number of Characters: 169 SMS Send Configuration Send From: Schedule Message: (773) 207-6760 Stop Participation   |    | SMS Template:                  |             | 1  | Aerge Fields:   |
| Number of Characters: 169         SMS Send Configuration         Send from:         (773) 207-6760         Image: Configuration  |    | -None-                         | \$          |    | -None-  |
| SMS Send Configuration         b.         Schedule Message:           (773) 207-6760         \$         Dec 15, 2020         \$         5:00 PM         C  |    |                                | ompleting a | ro | and of employment retention. Are you still working? Is there an |
| Send From:         Schedule Message:           (773) 207-6760         ・  |    | Number of Characters: 169      |             |    |   |
| Send From:         Schedule Message:           (773) 207-6760         ↓         Dec 15, 2020         前         5:00 PM         (0)   | )  |                                |             |    |   |
| (1/3) 207-5760 U Det 13, 2020 Stud PM  |    | MS Send Configuration          |             |    |   |
| C.   | SN | b.:                            | Schedule I  | Me | sage:   |
| С. 📻   | SN | Send From:                     |             |    |   |
|  | SN | Send From:                     |             |    |   |

<u>*Tip:*</u> Navigate to the "SMS" tab and select "Scheduled" from the "View" dropdown list to access your scheduled messages.

| cts Case Records  | Client Households | Groups & Classes | Reports  | Dashboards SMS                        | SMS Templates | Bulk SMS          | Form Templates   |
|-------------------|-------------------|------------------|----------|---------------------------------------|---------------|-------------------|--|
|                   |                   |                  |          | · · · · · · · · · · · · · · · · · · · |               |                   |  |
| Ms<br>Home        |                   |                  |          |                                       |               |                   |  |
|                   |                   |                  |          |                                       |               |                   |  |
| View: Scheduled 🗸 | Go!               |                  |          |                                       |               |                   |  |
| Coneduled •       |                   |                  |          |                                       |               |                   |  |
|                   |                   |                  |          |                                       |               |                   |  |
| Recent SMS        |                   |                  |          | Create New SMS                        |               |                   |  |
|                   |                   |                  |          |                                       |               |                   |  |
| SMS Number        | Contact           | Phone Number     | Directio | n Status                              | Mess          | age               |  |
| SMS201210-0040    |                   | +17738350828     | Outgoin  | g Scheduled                           | Hi Yol        | anda. It's time f | to review your semi-annual credit report. Are you free for a video call? |
| SMS201028-0010    | Lisa Fake         | +17738350828     | Outgoin  | g Sent Successfully                   | Test n        | nessage           |  |
|                   |                   |                  |          |                                       |               |                   |  |

4. Bulk Messaging via Reports

**<u>Note</u>**: You will need to create the report first and use [Mogli] in the report title. You will also need your clients' IDs and Mogli numbers as columns in your report.

- a. Navigate to the "Bulk SMS" tab
- b. Select the report name and either select your SMS template or type in your messages.
- c. Click on the "Send" button.

| Bulk SMS                                    |                    |                        |   |  |      |          |               |      |
|---|--------------------|------------------------|---|--|------|----------|---------------|------|
| Recipient Selector                          |                    |                        | s | MS Recipients  |      |          |               |      |
| Campaign 1<br>Search Campaigns Q            | Report 1           | Group(s) for Reporting |   | <+17738350828>;  |      |          |               |      |
| Case Record Contact                         |                    |                        |   | Number of Recipients: 1                                      |      |          |               |      |
| Search Case Record Records                  |                    |                        |   | MS Message   |      |          |               | <br> |
| A B C D E F G H I<br>U V V                  | J K L N<br>V X Y Z |                        |   | SMS Template:  |      | ¢        | Merge Fields: | ¢    |
| Name     Yolanda Smith FOC 11/2020 Case Rec | ord                | Phone Number           |   | Congratulation, you have succ<br>about your matched fund use | age. |          |               |      |
|   |                    |                        | s | MS Send Configuration  |      |          |               |      |
| 4   |                    | •                      |   | Send From:<br>(773) 207-6760                                 | \$   | Schedule | Message:      |      |
| Selected Rows: 0 No mo                      | ore rows available |                        |   | (113) 201-0100   | Ť    |          | Ħ             | 0    |
|   |                    | Add                    |   |  |      |          |               | Send |

#### **Bulk Messaging Reports:**

- d. Groups/Class Report: https://lisc.force.com/partners/0001Q000007jCpl
  - i. Steps to filter the report per class name:
    - 1. Click on "Customize"
    - 2. Hover over the *Group-Class Name equals* "*Edit AND Insert Text*" filter and click on "Edit"
    - 3. Replace "Edit AND Insert Text" with the class name
    - 4. Click on "OK" and "Run Report"
    - 5. Save your report by clicking on "Save As" (use [Mogli] at the start of the report name) and select your agency's folder

- e. Group(s) for Reporting (Case Record): <u>https://lisc.force.com/partners/0001Q000007jCq0</u>
  - i. Steps to filter the report per group name:
    - 1. Click on "Customize"
    - 2. Hover over the *Group(s)* for reporting includes "" filter and click on "Edit"
    - 3. Type in the group name in the empty box
    - 4. Click on "OK" and "Run Report"
    - 5. Save your report by clicking on "Save As" (use [Mogli] at the start of the report name) and select your agency's folder
- f. FOC Assigned Staff (Case Record): <u>https://lisc.force.com/partners/0001Q000007jCqP</u>
  - i. Steps to filter the report per staff name:
    - 1. Click on "Customize"
    - 2. Example for the Career Coach:
      - a. Hover over the *Career Coach: Full Name not equals to* "" filter and click on "Edit"
      - b. Change "Not equals to" to "Equals" and type the Employment Coach full name in the remaining box.
        - E.g. Career Coach: Full Name equals Carolina Rendon
      - c. Click on "OK"
      - d. Update the Filter Logic by hovering it over and clicking "Edit"
      - e. Copy & Paste this order: 1 AND 2 AND (3 OR 4 OR 5)
      - f. Click on "OK" and "Run Report"
    - 3. Save your report by clicking on "Save As" (use [Mogli] at the start of the report name) and select your agency's folder

#### Filter Logic per role:

- a. Career Coach: 1 AND 2 AND (3 OR 4 OR 5)
- b. Employment Coach: 1 AND 3 AND (2 OR 4 OR 5)
- c. Financial Coach: 1 AND 4 AND (2 OR 3 OR 5)
- d. Income Support Coach: 1 AND 5 AND (2 OR 3 OR 4)