



Text Messaging Application

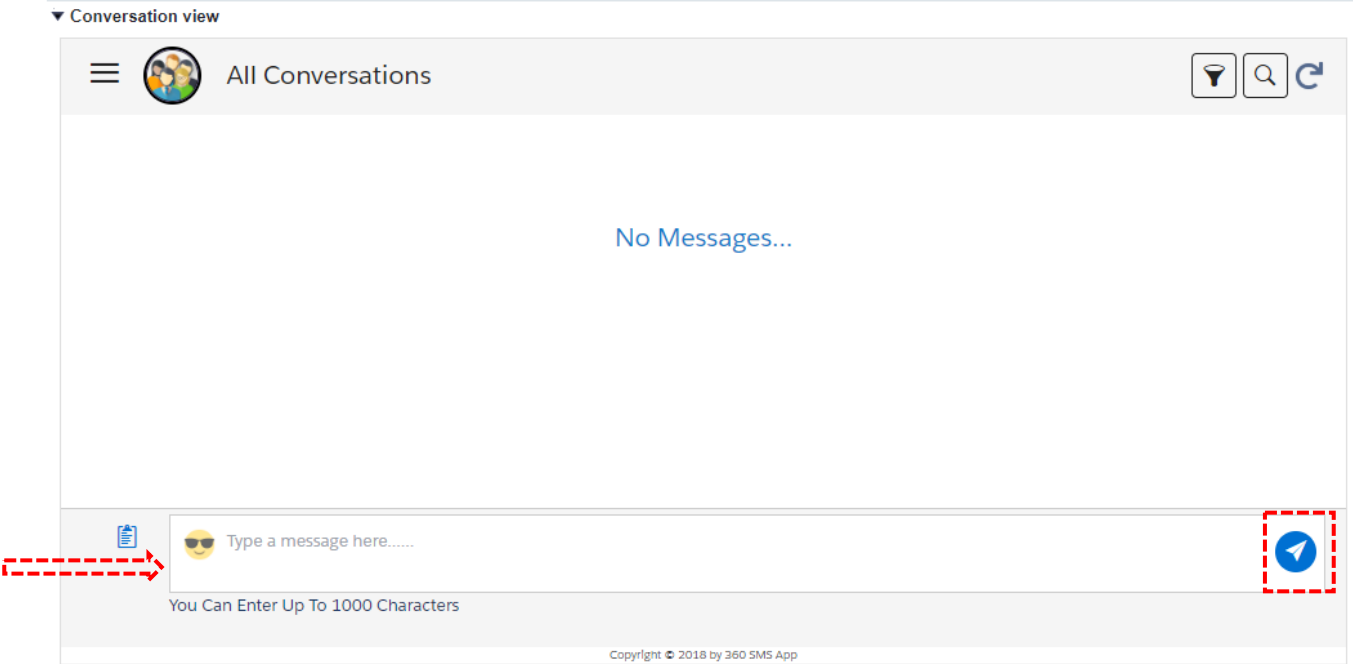
Features:

- **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.
- **Alerts on Incoming SMS:** Incoming and replying panel plus email notifications.
- **Bulk SMS:** Send mass text messages via “SMS from Reports” to a group of clients.

App Requirement: Client mobile number

Conversational 1-on-1 Texting:

1. Start by searching for your client’s name using the search box .
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 “Conversation View” section, start typing the message, and once completed click the “Send” icon (paper plane).



SMS Templates:

1. 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. Start by giving your template a name and indicate if the template will be used on the “Contact” or “Case Record” tab. For example, “Credit Report Pull Due_Case Record” or “Initial Message_Case Record”.
3. For “Select Object” **only use “Contact” or “Case Record”** and the status is “Active”.
4. Formula: Use the fields listed in this section to build your custom message. For example, Hi {!expecm__case_record__c.expecm__first_name__c}, {!expecm__case_record__c.home_site__r.name} would like to send you text messages. You will be able to opt out at any time. To opt out reply STOP or UNSUBSCRIBE.
Tip: Don’t forget to Copy&Paste the “Formula Value”
5. For “Record Type”, select “Client” for the “Contact” object or “FOC” for the “Case Record” object.
6. Select your home site from the dropdown “Folder” list and click on “Save”.

SMS APP
Message Template

Template Name

Select Object

Case Record

Select Status

Active

Brief Description

GENERATE FORMULA

Case Record

--Select--

- # of days since last (attempted) contact
- Accenture LX Enrollment Date
- Account Number
- Action Plan - Tier 1A
- Action Plan - Tier 1B
- Admit Date
- Alternate database client #
- Applied Date
- Authorization Form Signed

TEMPLATE BODY

Hi {!expecm__case_record__c.expecm__first_name__c}, {!expecm__case_record__c.home_site__r.name} would like to send you text messages. You will be able to opt out at any time. To opt out reply STOP or UNSUBSCRIBE.

211 Characters / 2 Segment

Record Type

ExpTest2

FOC

Tax Preparation

Folder

Breakthrough Urban

NEXT SMS TEMPLATE

Save
Cancel
Send Test and Verify merge field

Exercise1:

Create a new template following the instructions below:

- 1. **Template Name:** Credit Report Due_Case Record
- 2. **Object:** Case Record
- 3. **Status:** Active
- 4. **Template Body:**

Hi [locate the client’s first name], it's been [locate the days since last credit pull] days since your last credit report pull. Let's schedule an appointment. What is your availability next week? - Thanks [locate the Financial Coach full name].

- 5. **Record Type:** FOC
- 6. **Folder:** Your home site folder
- 7. **Save**

Formula answer:

TEMPLATE BODY

```
Hi {!expecm__case_record__c.expecm__main_client__r.firstname}, it's been {!expecm__case_record__c.no_of_days_since_last_credit_report__c} days since your last credit report pull. Let's schedule an appoinmetn. What's your availability next week? - Thanks {!expecm__case_record__c.financial_coach__r.expecm__full_name__c}
```

319 Characters / 3 Segment

Exercise2:

Create a new template following the instructions below:

- 1. **Template Name:** Verified Retention_Case Record
- 2. **Object:** Case Record
- 3. **Status:** Active
- 4. **Template Body:**

Hello [locate the client’s first name], this is [locate the Employment Coach full name] from [locate the home site name]. I'm completing a round of employment retention and I would like to confirm if you're still employed at XX. Thank you in advance!

- 5. **Record Type:** FOC
- 6. **Folder:** Your home site folder
- 7. **Save**

Formula answer:

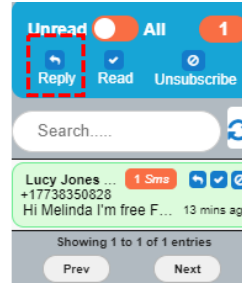
TEMPLATE BODY

```
Hello {!expecm__case_record__c.expecm__main_client__r.firstname}, this is {!expecm__case_record__c.employment_coach__r.expecm__full_name__c} from {!expecm__case_record__c.home_site__r.name} . I'm completing a round of employment retention and I would like to confirm if you're still employed at XX. Thank you in advance!
```

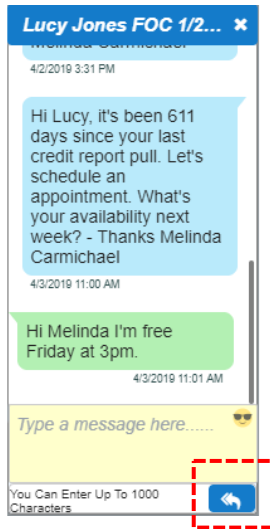
320 Characters / 3 Segment

Alerts on Incoming SMS:

1. Use the incoming panel to monitor unread messages and reply directly without having to navigate to the client's "Contact" or "Case Record".
2. On the incoming/unread message view, click on the reply icon to send a response.



3. The message boxes change colors depending on how long ago the message was received—it's green for the first hour, then yellow, and after two hours it turns red/pink.
4. Draft your response and click on the send icon.

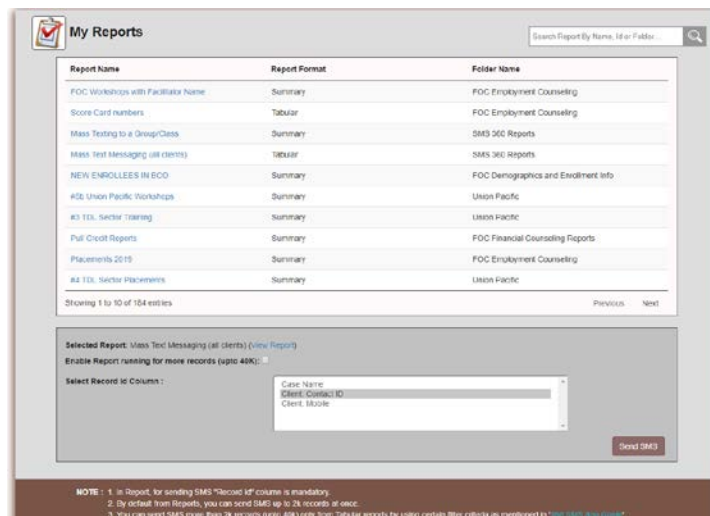


Bulk SMS:

1. To send bulk text messages to a group of clients use the "SMS From Reports" tab SMS From Reports
2. Note: You will need to create, or modify reports first in order use this feature.
 - a. Groups/Class Report: <https://lisc.force.com/partners/0001Q000007yamy>
 - 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" and select your agency's folder
 - b. Group(s) for Reporting (Case Record): <https://lisc.force.com/partners/0001Q000007yanN>
 - 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” and select your agency’s folder
- c. FOC Assigned Staff (Case Record): <https://lisc.force.com/partners/0001Q000007arRv>
 - i. **Steps to filter the report per staff name:**
 1. Click on “Customize”
 2. **Example for the Employment Coach:**
 - a. Hover over the *Employment 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. **Employment Coach: Full Name** equals **Melinda Carmichael**
 - c. Click on “OK”
 - d. **Update the Filter Logic by hovering it over and clicking “Edit”**
 - e. Copy & Paste this order: **1 AND 3 AND (2 OR 4 OR 5)**
 - f. Click on “OK” and “Run Report”
 - g. Save your report by clicking on “Save As” and select your agency’s folder
 3. 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)**

3. Once the report is saved, navigate to “SMS From Reports”, click on the report name you just created from the list and select the column with the Case Record ID. Lastly, click on “SEND SMS”.



4. On the “Create Message” screen, select a template (if applicable) and/or type the desired message for all the clients in the group. Click on “Send”.

Create Message

Send To (Selected Case Record: 5)

Survey Folder

Choose Folder
--None--

Choose SMS Template
--None--

Message

You Can Enter Up To 1000 Characters

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Cancel Send