

LSC

mogli[™]

Text Messaging Application User Guide

Financial Opportunity Center
LOCAL INITIATIVES SUPPORT CORPORATION



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Intended Uses and Samples:

- **Individual appointments and reminders.**

Sample 1: [BDO Name]: Reminder! Your appointment with [Coach Name] is tomorrow at [Enter time]. To reschedule or cancel, please call [Enter Number]

Sample 2: [BDO Name]: Hello [Client name], it's been 3 months since our last chat. Let's schedule an appointment. What is your availability next week? – Thanks, [Coach Name].

- **Individual communication of successes included goals met and application statuses of sought out grants and loans. Also, reminder to stay in touch with the coach.**

Sample 1: [BDO Name]: Hello [Client Name], I wanted to check-in on the status of your loan application and how we can continue to support you. Please call [Enter Name] at [Enter number] to hear more.

Sample 2: [BDO Name]: Congratulations on completing your business plan! Let's schedule an appointment to discuss next steps. What is your availability next week? – Thanks, [Coach Name].

- **Information about upcoming events and workshops.**

Sample 1: [BDO Name]: Join us [Date] as we discuss Business Plan Best Practices. See the flyer attached for more information – Thanks, [Coach Name]. (Attach .jpeg flyer to text)

Sample 2: [BDO Name]: Due to weather conditions, our offices will be closed today and will reopen [Date]. To reschedule, please call [Enter Name] at [Enter number].

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 “Case Record”.
- **SMS Template:** Create custom templates for appointment reminders, general follow-up, etc.
- **Bulk SMS:** Send mass text messages to a group of clients.

Application Requirement: Client mobile number for the “Mogli Number”.

Tip: If a client is missing the “Mogli Number” on the “Case Record” click on “Edit” and “Save” to re-trigger the number. Add +1 in front of number.


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

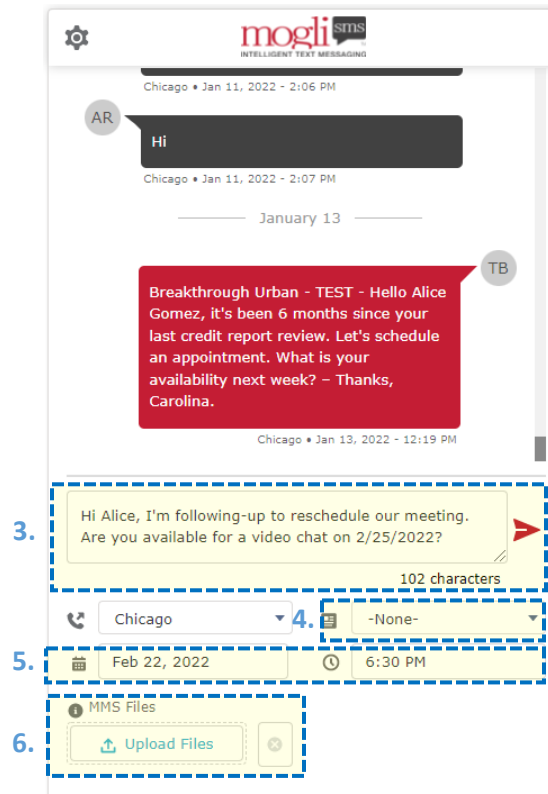
- | | |
|---|--|
| <ul style="list-style-type: none"> ▪ Stop ▪ Unsubscribe ▪ End ▪ Quit ▪ Cancel | <p>∨ Upcoming Texting Functionality - not yet deployed</p> <p>Mogli Number
+18326958745</p> <hr/> <p>Mogli Opt Out
<input checked="" type="checkbox"/></p> <hr/> |
|---|--|

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 .
2. Navigate to the client's "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.
6. Upload a jpeg, gif, png, pdf, mp4.



SMS Templates:

1. To create a custom template start by clicking on "More" in the navigation bar  and clicking on "SMS Templates" and then click on "New" .
2. Give your template a descriptive name and type in your messages. For example, *"Hello, it's been 3 months since our last chat. Let's schedule an appointment. What is your availability next week? – Thanks"*
3. Click on the "Save" button

New SMS Template

Name
Follow-up: Loan Status

Text
Hello, I wanted to check-in on the status of your loan application and how we can continue to support you. Please call Lorena at 832-866-5601 to hear more.


Merge Fields:
-None-

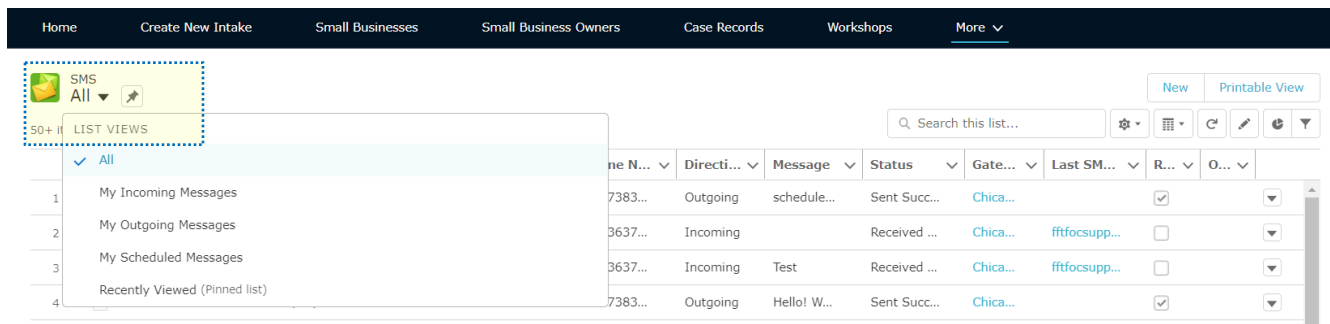
Selected Merge Field :

Tip: Template Merge fields - You can also create messages that auto-populate with specific client details such as the client’s and your agency name by 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.

Field Name	Merge field	Example text
Home Site	{{Home_Site_Name_x_c}}	Breakthrough – Urban
Client	{{Name__c}}	Alice Gomez
	{{First_Name_x_c}}	Alice
	{{Last_Name_x_c}}	Gomez

SMS List Views:

- To view all messages, incoming, outgoing and scheduled to be sent, click “More” in the navigation bar  and click on “SMS”
- To view just the message for your user select my incoming messages, my outgoing messages, my scheduled messages.



Name	Directi...	Message	Status	Gate...	Last SM...	R...	O...
7383...	Outgoing	schedule...	Sent Succ...	Chica...		<input checked="" type="checkbox"/>	
3637...	Incoming		Received ...	Chica...	fftfocsup...	<input type="checkbox"/>	
3637...	Incoming	Test	Received ...	Chica...	fftfocsup...	<input type="checkbox"/>	
7383...	Outgoing	Hello! W...	Sent Succ...	Chica...		<input checked="" type="checkbox"/>	

Bulk Messaging via Reports:

Note: 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.

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

Note: The maximum number of recipients of a bulk message is 2,000. Filter your reports to decrease the number of clients.

The screenshot shows the Mogli Bulk SMS interface. The 'Recipient Selector' section has a 'Campaign' dropdown set to '*not available' and a 'Report' dropdown set to '[Mogli] Group(s) for Reporting'. Below this is a search bar for 'Search Case Record Records...' with '*currently not available' and a keyboard filter. A table lists one recipient: Yolanda Smith FOC 11/2020 Case Record with phone number +17738350828. The 'SMS Recipients' section shows the phone number <+17738350828>. The 'SMS Message' section shows a template 'Twin Account Completion' with a message: 'Congratulation, you have successfully completed the Twin Account payments! Let's schedule a time to talk about your matched fund usage.' The 'SMS Send Configuration' section shows 'Send From' as (773) 207-6760 and a 'Send' button.

d. Message for Bulk SMS:

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

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

This screenshot shows the Mogli Bulk SMS interface with a different configuration. The 'SMS Recipients' section shows five phone numbers: <+18608612201>, <+16196165753>, <+18328665601>, <+13134635492>, and <+17734567889>. The 'SMS Message' section shows a template 'Sample First Text Mess' with a message: 'Hello [[ExpECM_Case_Record_c.Name_c]], [[ExpECM_Case_Record_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...'. The 'SMS Send Configuration' section shows 'Send From' as Chicago and a 'Schedule Message' section with a 'Send' button.


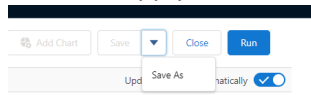


Bulk Messaging Reports:

Note: These reports are located in the “Mogli SMS” folder that you can find in the “BDO Network – Partners” folder.

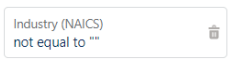
e. Active Case Records: [Access Report](#)

i. Steps to filter by Enrolled Date:

1. Click on “Edit”
 2. Hover over the Filters  and click on “Enrolled Date”.
 3. Click on the drop-down menu under “Range” and choose a fixed time period, or click on “Customize” to enter a custom date range.
 4. Click on “Apply” and click on the arrow next to “Save” and click on “Save As”
- 
5. Save your report with [Mogli] at the start of the report name and select your agency’s folder.

f. By Industry: [Access Report](#)

i. Steps to filter the report per Industry:

1. Click on “Edit”
 2. Click on Filters  and click on Industry 
 3. Add all the industries you would like to see in the report - including the default set to *not equal to ""*
 4. Click on “Apply” and click on the arrow next to “Save” and click on “Save As”
- 
5. Save your report with [Mogli] at the start of the report name and select your agency’s folder.

2. Opt Out of Messaging: [Access Report](#)

- i. This report shows you all clients that do not want to be messaged via text. They have a check selected in their Case Record for “Mogli Opt Out”.

✓ Upcoming Texting Functionality - not yet deployed

Mogli Number	+18326958745	
Mogli Opt Out	<input checked="" type="checkbox"/>	