LISC

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

  Sample 2: [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.**

  Sample: [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.

  Sample 2: [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.**

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

  Sample 2: [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". ***Tip:*** 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:

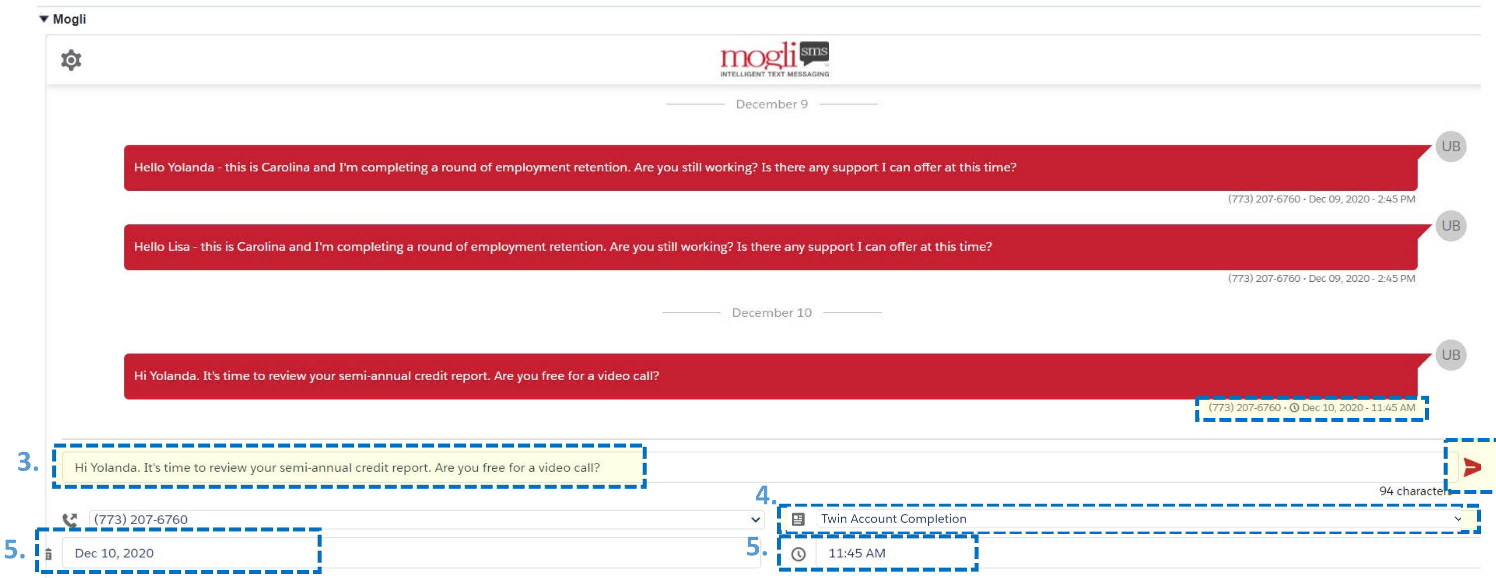
- **Stop**
- **Unsubscribe**
- **End**
- **Quit**
- **Cancel**

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

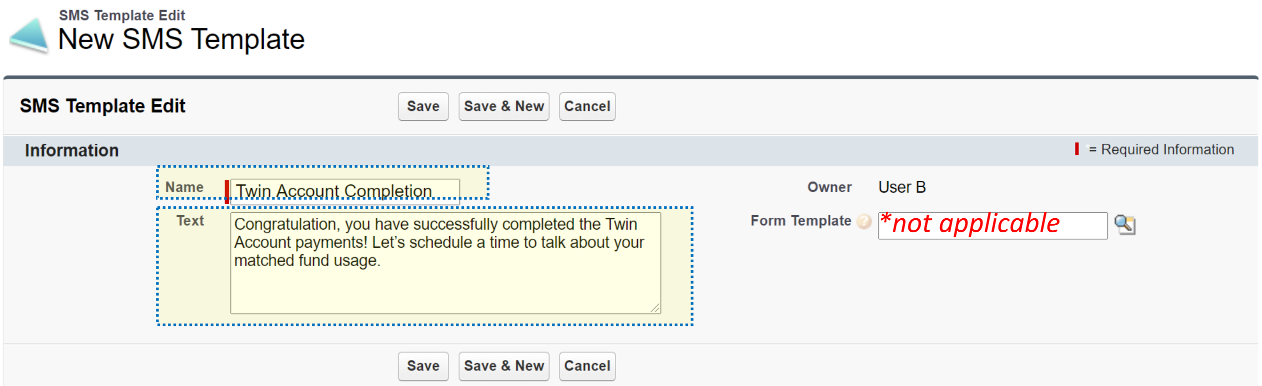
Conversational 1-on-1 Texting:

1. Start by searching for your client's name using the search box Search... 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.



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. 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

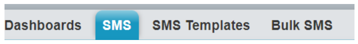


Tip: Template Merge fields - You can also create messages that auto-populate with specific client details such as their name, their FOC coach name, the number of days since their last budget, etc., using “merge fields”. To do so, simply copy and paste the merge field into your message. Make sure that 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.

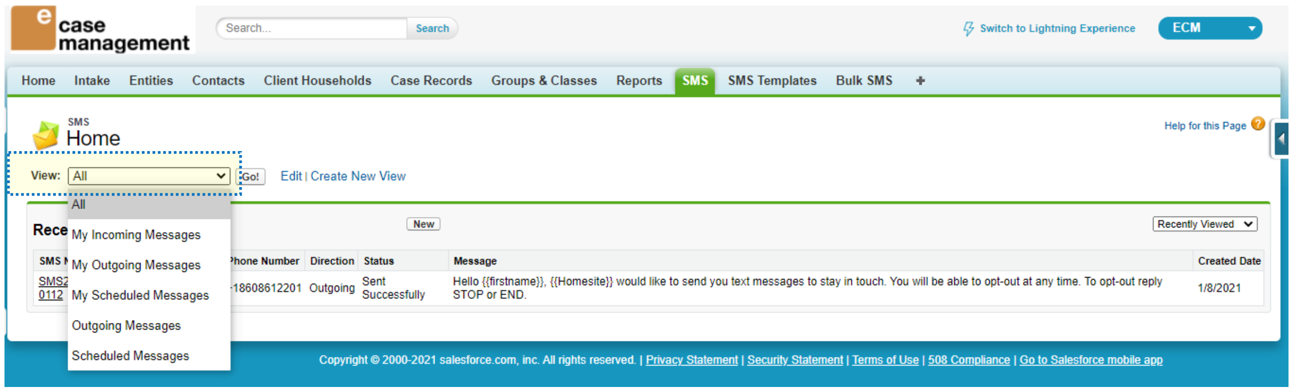
Field Name	Merge field	Example text
Home Site	{{Home_Site_Name_x__c}}	Breakthrough – Urban
Client	{{Name__c}}	Jackie Fake
	{{First_Name_x__c}}	Jackie
	{{Last_Name_x__c}}	Fake
# of days since last (attempted) contact	{{of_days_since_last_attempted_contact__c}}	88
No. of days since last Financial Health	{{No_of_days_since_last_Financial_Health__c}}	80
No. of days since last Budget	{{No_of_days_since_last_Budget__c}}	30
No. of days since last Credit Report	{{No_of_days_since_last_Credit_Report__c}}	180
No. of days since last Balance Sheet	{{No_of_days_since_last_Balance_Sheet__c}}	30
Emergency Cash Assistance Survey ID	{{Emergency_Cash_Assistance_Survey_ID__c}}	241791
Enrolled Date	{{Enrolled_Date__c}}	6/4/2019
Career Coach	{{Career_Coach_Name__c}}	Melinda Carmichael
Financial Coach	{{Financial_Coach_Name__c}}	Melinda Carmichael
Income Support Coach	{{Income_Support_Coach_Name__c}}	Melinda Carmichael
Employment Coach	{{Employment_Coach_Name__c}}	Melinda Carmichael
Other FOC Staff	{{Other_FOC_Staff__c}}	Melinda Carmichael
First Payment Date	{{First_Payment_Date_x__c}}	1/1/2019
Maturity Date	{{Maturity_Date_x__c}}	2/1/2020

SMS List Views:

1. To view all messages, incoming, outgoing and scheduled to be sent, use the “SMS” tab.



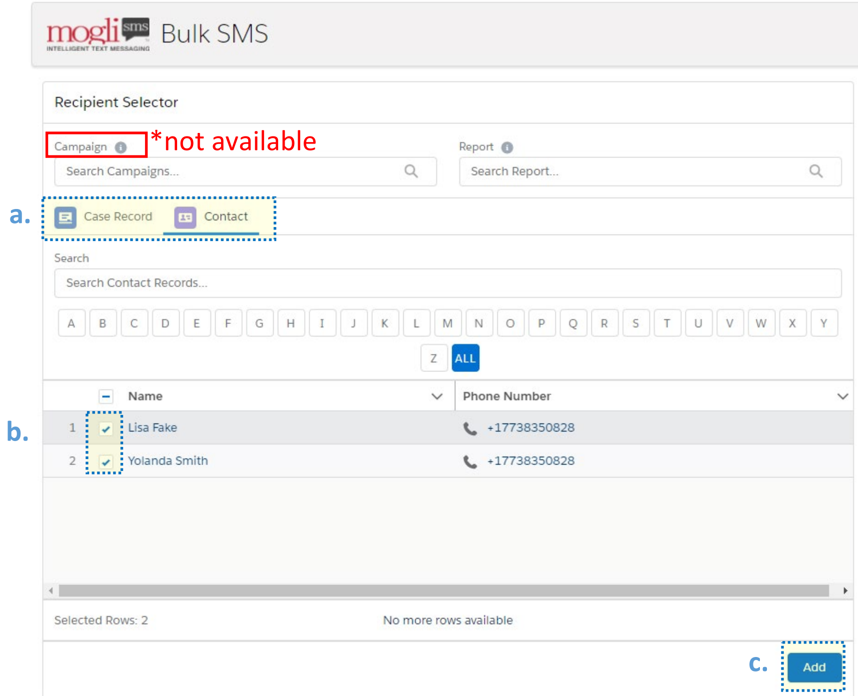
2. To view just the message for your user select my incoming messages, my outgoing messages, my scheduled messages.



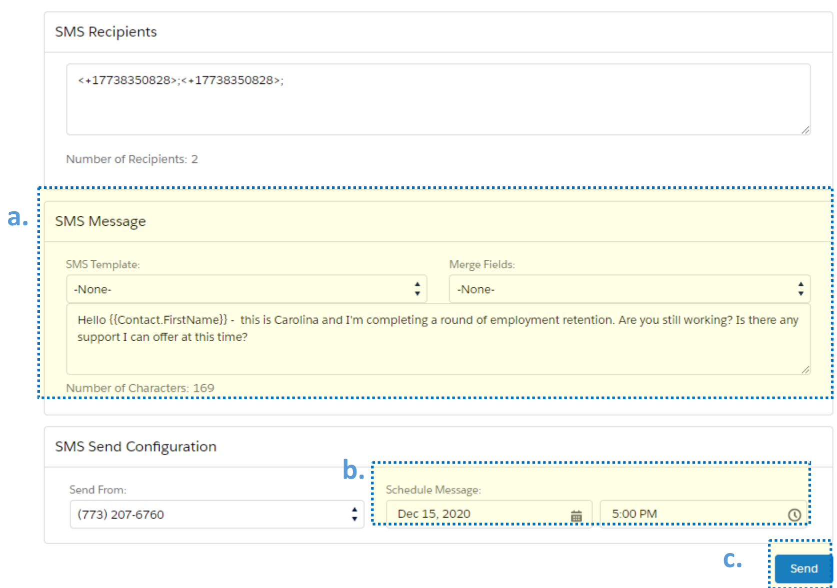
Bulk SMS:

1. To send bulk text messages to a group of clients use the “Bulk SMS” tab 

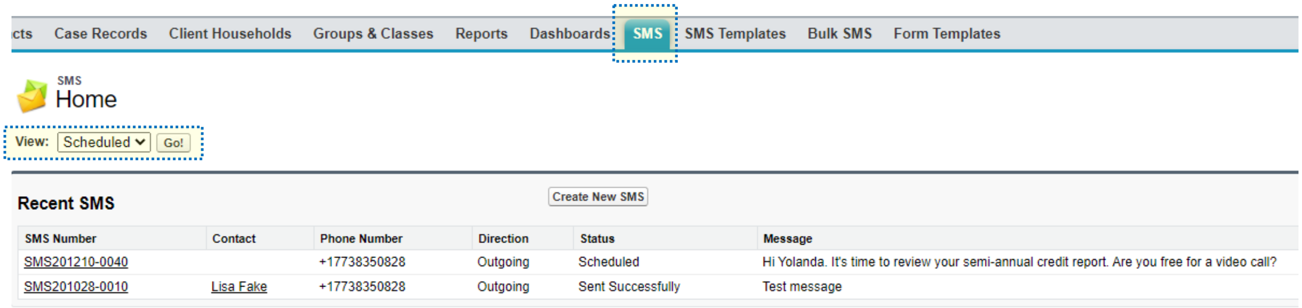
   a. Via search or via reports
      i. ***Tip:*** If you’re using both a report and search, load the report <u>first</u> and then add the remaining clients via search.
2. Select your message recipients:
   a. Select either “Case Record” or “Contact”
   b. Search for your client’s name
   c. Check the box next to your client’s name and click on the “Add” button.



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

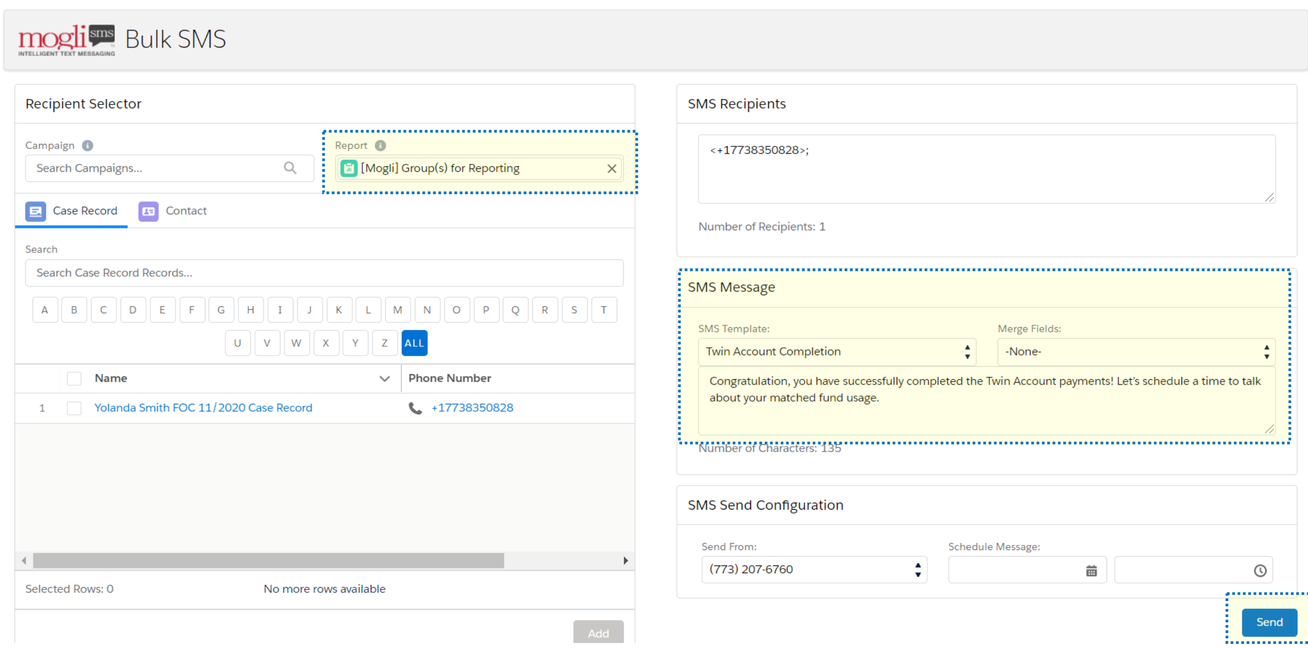


<u>Tip:</u> *Navigate to the "SMS" tab and select "Scheduled" from the "View" dropdown list to access your scheduled messages.*



4. 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.*
   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 Messaging Reports:

d. Groups/Class Report: https://lisc.force.com/partners/00O1Q000007jCpl
   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): https://lisc.force.com/partners/00O1Q000007jCq0
   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): https://lisc.force.com/partners/00O1Q000007jCqP
   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)**