



Product Manual

Version 1
March, 2021

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Introduction

Pidj is a text messaging platform that automates, streamlines, and personalizes text communication between your business and your customers. This guide will walk you through the simple steps to get your new Pidj account up and running. Self-help is built into the platform for quick tips on how to easily administer and perform common actions. For a more detailed guide, please reference the full product manual.

Features

Textcast - Send targeted messages to different audiences based on their unique criteria

Timetext

- Scheduled - Schedule texts to an individual or a group of recipients

- Reminders - Automate text reminders for customers relating to a predetermined date/time

- Interval - Leverage drip campaigns to communicate messaging over a period of time

Inbound Text Routing - Intelligently route inbound text communication to automated responses or queues for 1/1 interaction

Keywords - Trigger an action or set of actions when a contact texts in specific word

Live agent interaction - Have 1/1 conversations with customers to increase customer engagement and satisfaction

Open API - Text-enable software applications to enhance your current workflows and simplify customer communication

Logging In

To login, simply navigate to your company's custom URL or go to <https://gopidj.com/login> in your favorite browser and enter the account credentials provided to you.

If you have forgotten your password, click the forgotten password link below the login button. Then, enter the email address associated with your user account and follow the reset instructions contained in the system-generated email.



The image shows a login form for SpaceCube ARCHITECTS. At the top is a logo consisting of a purple hexagon with a white cube inside. Below the logo, the text "SpaceCube" is in a large, bold, purple font, and "ARCHITECTS" is in a smaller, red, all-caps font. The form has two input fields: "USERNAME/EMAIL" with the value "erik" and "PASSWORD" with masked characters "*****". There is a "Login" button with a lock icon. Below the button is a link that says "Forgot your username or password?". At the bottom is the "pidj.CO" logo.

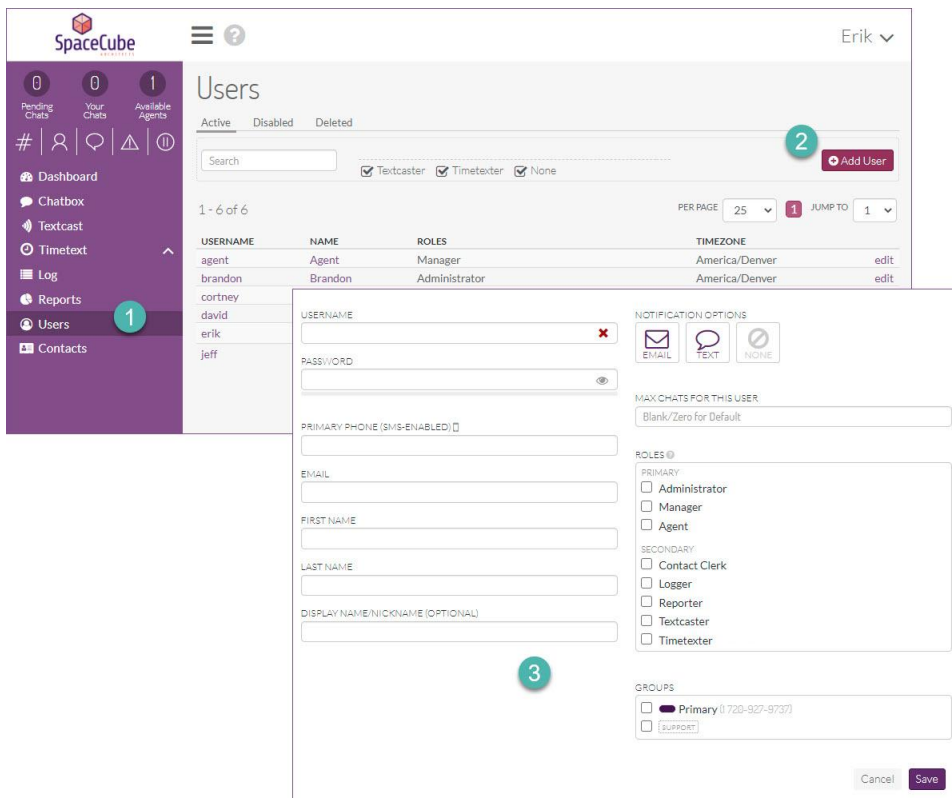
Adding Users

One of the first things you may want to do is add users to your account. Because Pidj charges you only for what you use, build as many users as you need.

To create a user:

1. Click Users in the left-hand menu
2. Select Add User in the upper right corner of the user screen.
3. Add the user information, assign roles, give group access, and select Save.

*For a description of available roles, click the (?) next to Roles.



Note: you can easily edit your active users to make changes on the fly or even temporarily disable or delete them completely.

Adding Contacts

Since your engagement is built around your contacts themselves, knowing how to add and segment contacts is key. Contacts can be found in the left-hand menu.

Adding a single contact

To add a contact:

1. Click the Add Contact button
2. Enter the contact details such as name, phone number, and email address
 - *Primary phone number is required. Adding tags to a contact will allow you to send targeted messages

For example, you may want to send a promotion to all of your gym customers that have the gold membership. For this, you might choose to add both a 'gold' and 'member' tag. This will allow you to send messages to all members when needed, as well as to only those with a gold membership.

SpaceCube

Erik ▾

Contacts

Active Blacklisted Blocking Deleted

Search [] Flush ... Export Bulk Import Add Contact

1 - 25 of 54 PER PAGE 25 1 2 3 JUMP TO 1

| NAME | PHONE | TIMEZONE |
|---------------|----------------|------------------|
| Abigail Bond | 1 303-555-0149 | America/New_York |
| Abigail Mills | 1 268-724-3334 | America/New_York |
| Ada V | | |
| Adam | | |
| Alber | | |
| Andre | | |
| Anna | | |
| Julia | | |
| Justi | | |

New Contact

EXTERNAL ID

SALUTATION

FIRST NAME

LAST NAME

DISPLAY NAME/NICKNAME

PRIMARY PHONE (SM/ENABLED)

HOME STREET

POSTAL

BUSINESS STREET

POSTAL

TAGS

No tags.

Cancel Save

Bulk importing contacts

To mass import your contacts:

1. Export them from their current location and save the file as a .csv
2. From the Contacts screen, select Bulk Import
3. Choose the .csv file you have saved
4. Map the field names in your list to the field names in Pidj, and click Import.

*You can import tags by adding a tags column. Multiple tags should be separated by a pipe bar “|” typically located above the Enter key

Contact Bulk Import

You can upload a CSV of your contacts for a quick start. Use the template provided to organize & gather your data.

We will attempt to find existing contacts by phone number or email address, but please be aware that doing an import more than once can easily produce duplicates.

***To import tags:** Enter any number of tags in a single column; separate multiple tags with the "bar" or "pipe" character; | To remove tags from an existing contact (untag): Enter any number of tags in a single column, separated as the Tags, then select "Untag" for that column.

SUPPORTED FIELDS

- First Name
- Last Name
- Company Name
- Display Name
- Primary Phone Number
- Email Address
- Home Street Address
- Home Postal
- Group
- Tags*
- Untag
- Any Custom Contact Field

UPLOAD CSV FILE

Choose File | Contacts.csv

1.4 KB

| First Name | Last Name | - ignore/discard - | - ignore/discard - |
|---|----------------------|-------------------------|--------------------|
| First Name | - ignore/discard - | Email | Number |
| Arthur | First Name | aspen@randatmail.com | (540) 896-7318 |
| Madaline | Last Name | m.walker@randatmail.com | (483) 864-8291 |
| Luke | Company Name | l.harper@randatmail.com | (416) 661-5769 |
| Julia | Display Name | j.cooper@randatmail.com | (505) 819-2263 |
| Jasmine | Primary Phone Number | j.smith@randatmail.com | (801) 482-2448 |
| ... plus more [21 total] (max 5 rows shown) | | | |

Please review the information and select what columns will be true of the Primary Phone Number and Email fields

you select the fields correctly. Any mismatch will create contacts with bad and misplaced data. This is especially integral to the system. Please also be sure to indicate if your file contains a header row.

☒ INCLUDES HEADER ROW

Cancel Import!

Note: if importing a subsequent list, Pidj will scrub the file for duplicate phone numbers and emails addresses. As with any import, be mindful as duplicates can still happen.

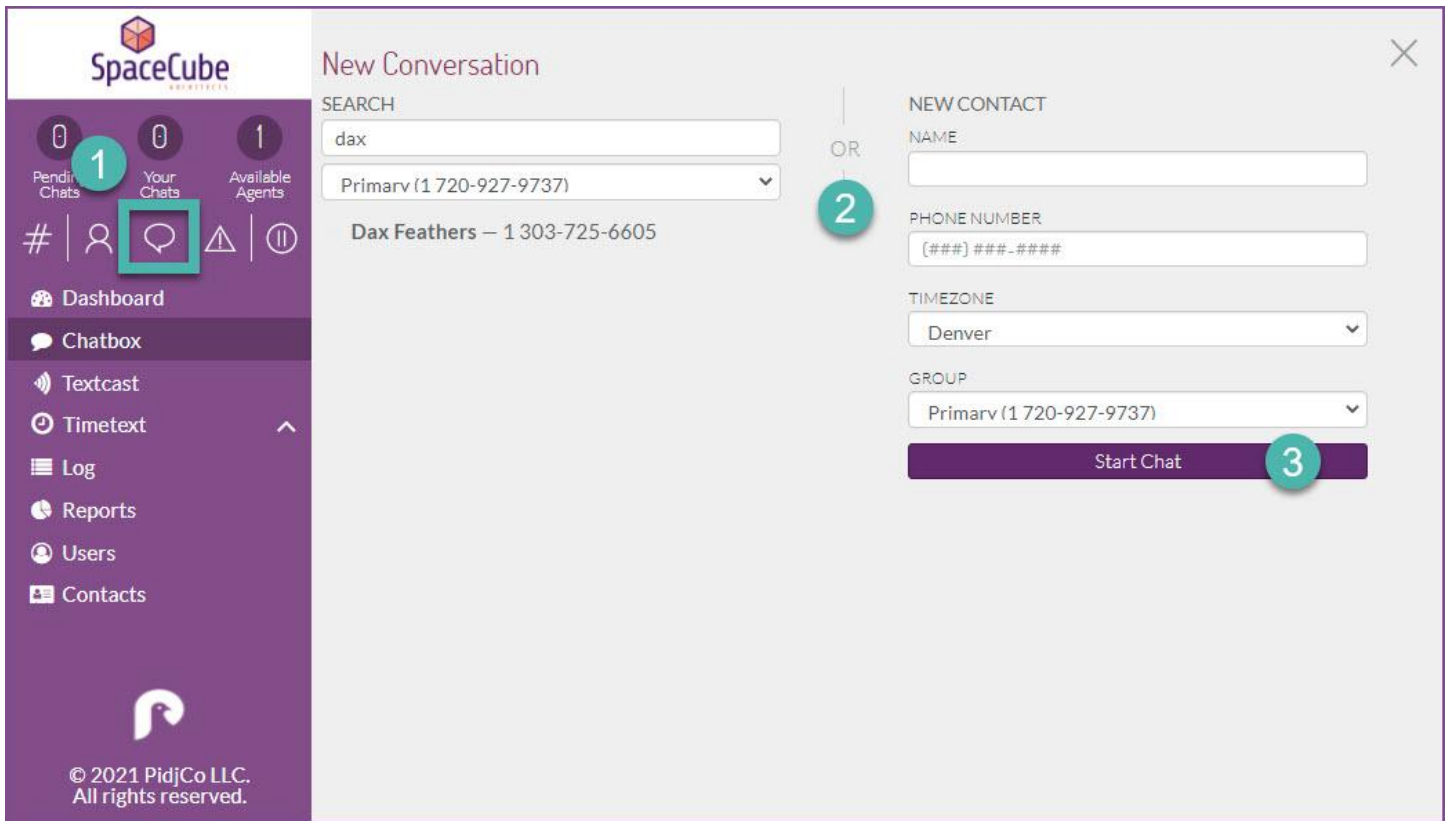
Sending Messages

As a business you may want to send a text out to every customer you have, a subset of customers, or perhaps simply begin a conversation with a single customer. Pidj has you covered for every scenario.

Single contact

Sending a single message:

1. Select the New Message button at the top of the left-hand menu.
2. Search for a contact or enter new contact information and choose the number to send from
3. Click Start Chat



A new chat window will pop up where you can send and receive messages with your contact.

Many contacts - Textcast

You can send a message to your contact list or to only those contacts that match certain criteria in just a few easy steps. This allows you to effectively market new products, upcoming promotions, or provide relevant business notifications.

To send a Textcast:

1. Select Textcast from the left-hand menu.
2. Select the criteria your contacts should match (most commonly tags).
3. Select Search to populate the list of recipients.
4. Enter the message you would like to send and click Send.

*The toggle to match all criteria will either expand your results or allow you to target a smaller audience.

0

Pending Chats

0

Your Chats

1

Available Agents

#

|

|

|

|

|

Dashboard

Chatbox

Textcast

Timetext

Log

Reports

Users

Contacts

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Textcasts

SELECT RECIPIENTS

CRITERIA

Tag

member

MEMBER

ADD CRITERIA

BULK NUMBER ADD

☒ MATCH ALL CRITERIA

☐ REVIEW RESULTS/MULTI-SEARCH

☐ USE FUTURE RECIPIENT RESULTS

Search

Textcasts

TEXTCAST

TEMPLATE FORM

MESSAGE

Hey! It's that time of year again where helping those in need is so vitally important. Text 'donate' to easily donate as little as \$5 in just a few easy steps.

Form Variables

SEND FROM

Primarv (1 720-927-9737)

LABEL

Fall Youth Donation

Send!

Adjust Search

1

2

3

24

1 229-786-9578, Diane Davidson

1 269-692-3797, Albert Taylor

1 291-995-0576, Andrea Newman

1 303-555-0187, Keith Forsyth

1 341-687-1215, Samantha Riley

1 351-316-5289, Edwin Johnson

1 416-661-5769, Luke Harper

1 447-694-5707, Ada Wilson

1 483-864-8291, Madalline Walker

1 505-819-2263, Julia Cooper

1 540-896-7318, Arthur Spencer

1 557-486-4353, Sarah Brown

1 665-446-0695, Carl Martin

1 693-277-8688, Kevin Myers

1 713-761-0618, Ashton Walker

1 796-800-1118, Arthur Bennett

1 801-482-2448, Jasmine Smith

1 841-609-6605, Gabrielle Ogden

1 843-839-1948, Rafael Moore

1 851-351-5260, Sabrina Harper

1 877-919-7443, Rafael Brown

1 885-502-6734, Adam Phillips

1 909-402-1718, Richard Cooper

1 928-665-6543, Justin Gibson

To personalize your message, click Form Variables below the message box. This will allow you to inject the contact's name or other contact details into the message. If you would like to schedule the message to be sent later, simply click the Timetext toggle and select when you would like the message to be sent.

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Textcasts

TEXTCAST

TEMPLATE/FORM

MESSAGE

176/1600

Hey {!first_name}! It's that time of year again where helping those in need is so vitally important. Text 'donate' to easily donate as little as \$25 in just a few easy steps.

Form Variables

SEND FROM

Primarv (1 720-927-9737)

LABEL

Optional; for reporting & reference

Schedule

Adjust Search

TIMETEXT

LABEL

For Reference Only (Optional)

TIMEZONE

Denver (-6:00)

TIME FROM NOW

OR

AT DATE/TIME

MMS

ADD MEDIA

FILE UPLOAD

Click to Upload & Add

OR

URL

Add Media

PREVIEW

RECIPIENTS (24)

1 229-786-9578, Diane Davidson

1 269-692-3797, Albert Taylor

1 291-995-0576, Andrea Newman

1 303-555-0187, Keith Forsyth

1 341-687-1215, Samantha Riley

1 351-316-5289, Edwin Johnson

1 416-661-5769, Luke Harper

1 447-694-5707, Ada Wilson

1 483-864-8291, Madaline Walker

1 505-819-2263, Julia Cooper

1 540-896-7318, Arthur Spencer

1 557-486-4353, Sarah Brown

1 665-446-0695, Carl Martin

1 693-277-8688, Kevin Myers

1 713-761-0618, Ashton Walker

1 796-800-1118, Arthur Bennett

1 801-482-2448, Jasmine Smith

1 841-609-6605, Gabrielle Ogden

1 843-839-1948, Rafael Moore

1 851-351-5260, Sabrina Harper

1 877-919-7443, Rafael Brown

1 885-502-6734, Adam Phillips

1 909-402-1718, Richard Cooper

1 928-665-6543, Justin Gibson

Timetext

Pidj allows you to automate many of your workflows from basic scheduling to automating text campaigns or intelligent text reminders.

Scheduled

To create a scheduled text:

1. Select One Time under Timetext in the left-hand menu
2. Search for the contact you would like to send to, select when you would like the text to be sent, and craft your message
3. Click Schedule

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SpaceCube Erik ▾

Timetext

One Time Forms Reminders Series Calendar Help

APR 2021 MAY 2021 JUN 2021 JUL 2021 AUG 2021 SEP 2021 OCT 2021 NOV 2021 DEC 2021

RECIPIENT & SENDER

SEARCH
Search by number, name, or email

CONTACT
Dax Feathers – 1 303-725-6605

TIMEZONE
Denver (-6:00)

SEND FROM
Primarv (1 720-927-9737)

SCHEDULED TEXTS

EVENT

LABEL
For Reference Only (Optional)

TIME FROM NOW
minutes

AT DATE/TIME
2021-05-31 1:00 pm

TEMPLATE

MESSAGE
Hey Dax - Happy Memorial Day from your friends at SpaceCube! Thanks for being a valued customer.

Add Schedule

Note: you can schedule multiple messages to the same recipient simply by adding an event before clicking the Schedule button.

Series

Series can be used to build informational campaigns, nurture leads, or provide an enhanced onboarding experience to your employees or customers.

First, you'll want to create a series which can be found under the Admin Menu located in the upper right-hand corner and select Create Series.

Creating a new Series:

1. Give it a name
2. Provide a brief description
3. Add your messages

*each message should be assigned a delay which determines when the message will be sent in relation to when a recipient was subscribed to the Series.

Note: you can also personalize each message by selecting from the variables list to inject things like the contact's first name.

Subscribing contacts:

1. Select Series under the Timetext menu in the left-hand menu
2. Search for contacts matching your desired criteria
3. Choose the series, and click Send.

*contacts can also be automatically subscribed through a Keyword operation.

Reminders

Reminders can be used to send a text notification prior to an upcoming appointment, bill due date, or scheduled delivery date. This can help assure things like on-time payments and accurate appointment schedules.

To schedule automated reminders you must first create a form. Think of a form as the body of the reminder, where you can add placeholders for variables like date, time, location, and more.

To create a new form:

1. Select Forms under Timetext in the left-hand menu.
2. Give the form a name and craft its messaging
3. Click Create Form.

SpaceCube

Pending Chats: 0, Your Chats: 0, Available Agents: 1

Timetext: Forms

One Time | Forms | Reminders | Series | Calendar | Help

NEW FORM

NAME: Appointment Reminder

FORM TEXT (152/1600): Hey {!name}, don't forget your upcoming appointment on {!date} at {!time}. To reschedule, text 'change' to chat with one of our friendly staff members.

Create Form

See help & tips for assistance creating your Form Text.

Forms can be used with Series and Textcasts & will pull information from contacts. Here are the variables supported for these uses (click to add):

| | |
|------------------|--|
| {!first_name} | first name |
| {!last_name} | last name |
| {!display_name} | display name (will default to first and last if none is set) |
| {!first_initial} | first initial |
| {!last_initial} | last initial |
| {!email} | email address |
| {!phone} | primary phone number |

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Note: almost any variable field can be added by inserting `{!field_name}` into the message. These variables must exist in the file used for import in the next step.

To schedule your reminders:

1. Select Reminders
2. Choose the form
3. Upload the .csv file containing the reminder information
4. Map the fields and choose when to schedule each message
5. Click Submit.

The screenshot shows the 'Timetext: Reminders' form in the SpaceCube interface. The form is divided into several sections with numbered callouts:

- 1**: Points to the 'Reminders' tab in the left sidebar.
- 2**: Points to the 'A. SELECT YOUR FORM' section, which includes a text template: 'Hey [name], don't forget your upcoming appointment on [date] at [time]. To reschedule, text 'change' to chat with one of our friendly staff members.'
- 3**: Points to the 'B. UPLOAD CSV FILE' section, which includes a 'Select File' button and a file size limit of 'Max 25,000 rows per file. MUST have a header row. For best results, see our details & tips.'
- 4**: Points to the 'C. FIELD TO COLUMN MAP' section, which includes a table for mapping CSV fields to form fields. The table has columns for 'Field' and 'Column'. The 'Field' column contains 'phone number', 'name', 'date', and 'time'. The 'Column' column contains '3037256605', 'Name', 'Date', and 'Time 10:00am'.
- 5**: Points to the 'H. ALERTS' section, which includes a 'Time Before Reminder Date/Time' dropdown, a 'TIME BEFORE REMINDER DATE/TIME' section with 'Months', 'Days', 'Hours', and 'Minutes' dropdowns, and a 'REMINDERS TO SEND' section with a 'SAVE MAPPING AS REMINDER' checkbox and a 'Mapping name' field.

Calendar

Once you have scheduled messages to be sent out using any of the above options, you will be able to view, edit, or abort by viewing the calendar. Here, you will see how many of each type are scheduled on any given day. Clicking on one will allow you to view and modify if needed.

Groups and Pathways

In Pidj, groups allow you to queue inbound messages that are handled by a specific team. Pathways enable you to route inbound text messages to those groups for live agent interaction or simply send automated responses.

Groups

Your Pidj account has a single, pre-built primary group. This allows you to send and receive messages from day one. You can add groups based on things like department, topic, or campaign.

First navigate to Groups under the Admin Menu in the upper right-hand menu.

To add a group:

1. Click the Add Group.
2. Give the new group a name
3. Assign a new number (optional),
4. Add a manager (optional)
5. Configure group settings and click Save

Groups

Configuration Groups Templates Series Pathways Help

1 - 2 of 2 PER PAGE 25 JUMP TO 1

| NAME | PHONE | VOICE FORWARD | MANAGER | WELCOME MESSAGE | FAREWELL MESSAGE | OFF-HOURS AUTOREPLY | HOLD ACTIONS |
|---------|----------------|---------------|---------|-----------------|------------------|---------------------|--------------|
| Primary | 1 720-927-9737 | — | — | ✖ | ✖ | ✓ | ✓ |
| Support | — | — | — | ✓ | ✓ | ✓ | ✓ |

Create Group

2 Name, Number & Customization

3 NAME

4 PHONE NUMBER

5 SCHEDULE HANDLING

NAME: Field Services

PHONE NUMBER: 1 720-927-9737

MANAGER(S): Jeff

Transfers

CAN RECEIVE TRANSFERS: No

SILENT TRANSFERS: No

Schedule Handling

TIMEZONE: Denver (-6:00)

OFF-HOURS HANDLING ENABLED: No

Note: you will need to add the group(s) to the users desired by editing each user and selecting the correct group(s).

Pathways

Pathways within Pidj allow you to automate inbound text interactions. This allows you to effectively provide information, queue chats up for a live agent, or simply terminate the interaction with a message..

You will build your pathway by creating nodes. Each pathway must contain at least one. First, choose Pathways from the Admin Menu in the upper right-hand corner.

To add a node:

1. Click Create Node.
2. Enter a name, automated message, and add the acceptable responses/actions for each
3. Click Save

The screenshot displays the SpaceCube Pathways interface. On the left is a purple sidebar with navigation links: Dashboard, Chatbox, Textcast, Timetext, Log, Reports, Users, and Contacts. At the top of the sidebar are status indicators for Pending Chats (0), Your Chats (0), and Available Agents (1). The main header shows the SpaceCube logo, a menu icon, a user profile for Erik, and the title 'Pathways'. Below the header is a toolbar with Configuration, Groups, Templates, Series, Pathways, and Help. A 'Create Node' button is highlighted with a green circle '1'. The main content area is titled 'Main Menu | Options' and 'Edit Node'. It contains a 'NODE' section with a 'LABEL' field set to 'Main Menu | Options' and a 'MESSAGE' field with a text template. Below this is an 'ID' field. To the right is the 'RESPONSES' section, which is a table with columns for RESPONSE, ACTION, and CONCLUDING TEXT. It contains three rows of response configurations. The first row has response '1' and action 'Send Text & End Interaction'. The second row has response '2' and action 'Send to Another Node', with a 'TARGET NODE' dropdown set to 'More Info'. The third row has response '3' and action 'Send to Queue (Assign to Agent)', with a 'SEND TO QUEUE' dropdown set to 'Support'. A fourth row is partially visible with an empty response field and action '-- select action --'. A green circle '2' highlights the second row. At the bottom right of the responses section are 'ADD RESPONSE', 'Cancel', and 'Save' buttons, with a green circle '3' highlighting the 'Save' button.

Note: If creating multiple nodes, it is best to work backwards, creating your final node first. Assigning the new pathway within a group's settings will determine when a contact will interact with it.

Keywords

Your Pidj account allows you to create an unlimited number of keywords; each configured to perform an action or set of actions when texted. Keyword management can be found under the Admin menu in the upper right-hand corner.

Building Operations

First, you will want to build an operation which is an action or multiple actions set to happen when a keyword is texted. These actions can be:

Tag - this will tag a contact with up to 5 preset tags automatically.

Reply w/text - sets an auto-reply text to be sent

Send to queue - sends the contact into a specific queue to chat with an agent

Subscribe to series - subscribes a contact to a specified drip campaign

Send to pathway - routes a contact to an automated pathway to provide automated information or drop into a queue to chat with an agent

Initiate survey - this launches a preset survey with the contact

To add a new Operation:

1. Click Add Operation from the Keyword management screen in the Admin Menu
2. Give the operation a name
3. Assign it to a Keyword if one already exists
4. Configure the actions you would like to take place

Below is a simple example, where a keyword is sent in, the contact is tagged, sent a response, and subscribed to an informational Series.

The screenshot shows the SpaceCube Admin interface. On the left is a purple sidebar with navigation links: Pending Chats (0), Your Chats (0), Available Agents (1), a search icon, and icons for user, chat, and settings. Below these are links for Dashboard, Chatbox, Textcast, Timetext, Log, Reports, Users, and Contacts. At the bottom of the sidebar is a copyright notice: © 2021 PidjCo LLC. All rights reserved.

The main content area is titled 'Signup Manage Operation'. It contains the following fields:

- NAME:** A text input field containing 'Get Started'.
- 1ST ACTION:** A dropdown menu with 'Tag' selected.
- 2ND ACTION:** A dropdown menu with 'Replv w/Text' selected.
- 3RD ACTION:** A dropdown menu with 'Subscribe to Series' selected.
- TAGS:** A section with the instruction 'Enter up to 5 tags to add to the texter.' and five input fields. The first two fields contain 'member' and '2021'.
- REPLY TEXT:** A text area containing the message: 'Thanks for signing up! We will send details on next steps shortly! Reply STOP at any time to discontinue text messages.'
- SERIES:** A dropdown menu with 'New Member' selected.

At the bottom right of the form are two buttons: 'Cancel' and 'Save'.

Note: 'send to queue', 'send to pathway', and 'initiate survey' actions cannot be combined in the same operation.

If you have already established a keyword, you can easily select it directly from the operation. When you're all set, click Save.

Keyword Assignment

To add a Keyword, enter it into the field at the top of the keyword screen and click Add Keyword. Then, under Assignments, click Add Assignment, match it up to the desired Operation, and click Save.

Note: you can have multiple keywords assigned to the same operation.

Settings

As an admin user, you can easily configure your account or group settings by navigating to the admin menu in the upper right-hand menu and choosing settings or groups respectively. Let's take a quick look at a few important settings.

Adding your logo

Under account settings, you can easily add your logo to instantly make your instance feel more personal. To do this, under Branding & Customization select a logo file under from your desktop and click Save. Your logo will appear on your custom login page as well as in the top left corner within the Pidj application. You can also modify the left navigation bar color.

Auto-replies

Auto responses can be configured within your Primary or any additional group by editing that group's settings. There are a few options available to customize your customer interaction.

Off-hours - send an automated response if the text comes in outside of business hours

Welcome - send an automated welcome message when a text comes into the group

Farewell - send an automated farewell message when an interaction within that group is ended

Unavailable - send an automated response if all agents assigned to the group are logged out or unavailable

Notifications

Notifications can be configured to send emails and/or text messages if chats are neglected or even every time a new interaction is started.

Neglected chats - can be configured at the group level to notify users after a certain period of time that there is an unattended chat. Notifications follow the user's preferences set in their profile.

New interactions - can be configured only at the account level and will send a text OR email any time a new interaction is started in any group with any individual.

Text consent

Inbound text consent allows you to establish an opt-in workflow where new contacts can agree to receive messages from your company. It adds a layer of compliance and protection to those who need it.

You can configure a global text consent policy and workflow within your account settings and customize messaging within each group if you have multiple campaigns active. You can also configure certain groups to be exempt from the global text consent configuration. To set it up, simply toggle it on, click 'Populate for Me' adjust messaging to your liking and click Save.