



Product Manual

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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 engagement and satisfaction

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

Web Chat - Allow customers to connect with you through your website

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.

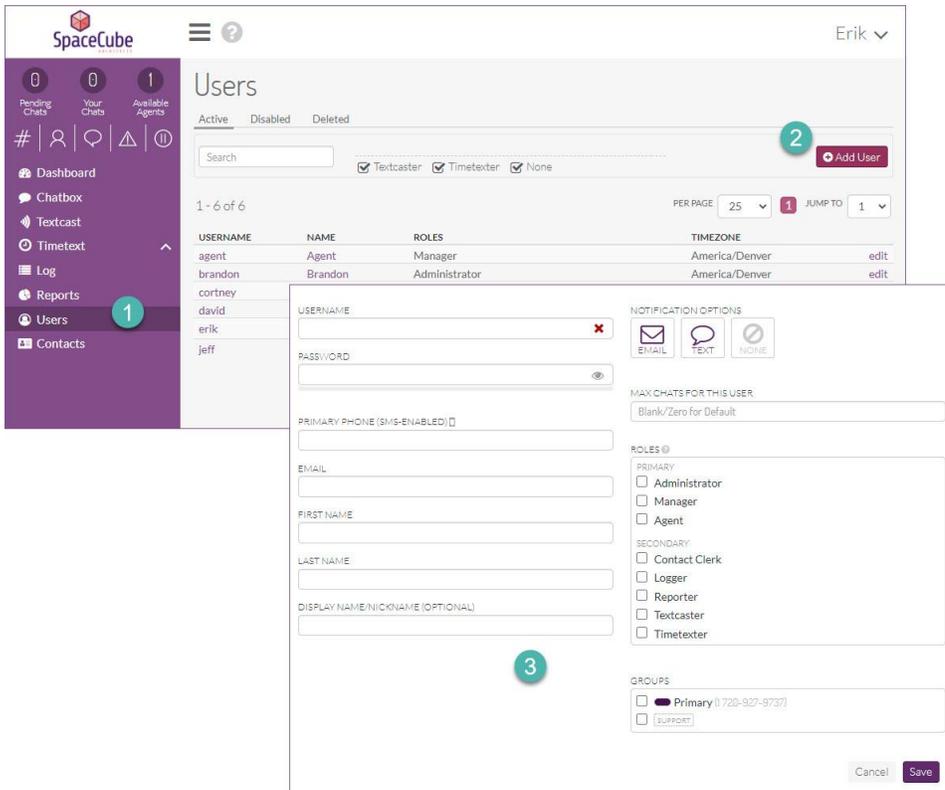


Adding Users

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, send a password reset email, 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.

The screenshot shows the SpaceCube Contacts management interface. On the left is a purple sidebar with navigation options: Dashboard, Chatbox, Textcast, Timetext, Log, Reports, Users, and Contacts. The main content area is titled 'Contacts' and includes tabs for Active, Blacklisted, Blocking, and Deleted. A search bar and buttons for 'Flush...', 'Export', 'Bulk Import', and 'Add Contact' are visible. Below these is a table of contacts with columns for Name, Phone, and Timezone. A 'New Contact' modal form is open, showing fields for External ID, Salutation, First Name, Last Name, Display Name, Primary Phone, Home Street, Business Street, and Postal. A red circle '1' highlights the 'Add Contact' button in the top right, and a red circle '2' highlights the 'Add' button in the modal form.

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 -
Arthur	- ignore/discard -	Email	Number
Madaline	First Name	a.spencer@randatmail.com	(540) 896-7318
Luke	Last Name	m.walker@randatmail.com	(483) 864-8291
Julia	Company Name	l.harper@randatmail.com	(416) 661-5769
Jasmine	Display Name	j.cooper@randatmail.com	(505) 819-2263
	Primary Phone Number	j.smith@randatmail.com	(801) 482-2448
	Email Address		
	Home Street Address		
	Home Postal		
	Group		
	Tags		
	Untag		

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 email addresses. As with any import, be mindful as duplicates can still happen.

Tue, 14 Dec 2021, 10:26 am Completed Hide Log

```

Starting Contact Import: 2021-12-14 17:26:35
Processing 23 contacts...
Processed 23 new contacts and 0 updated/restored contacts.
Done: 2021-12-14 17:26:35

```

You can view the status and logs of every import processed within the Bulk Import screen.

Managing Contacts

Contacts can be one of four statuses: Active, Blacklisted, Blocking, and Deleted.

Active - contacts you can send messages to and receive messages from

Blacklisted - contacts whose inbound messages will be ignored (i.e. spammers)

Blocking - contacts who have replied STOP to opt-out of your messages

Deleted - contacts that are currently inactive (you can restore at any time)

Sending Messages

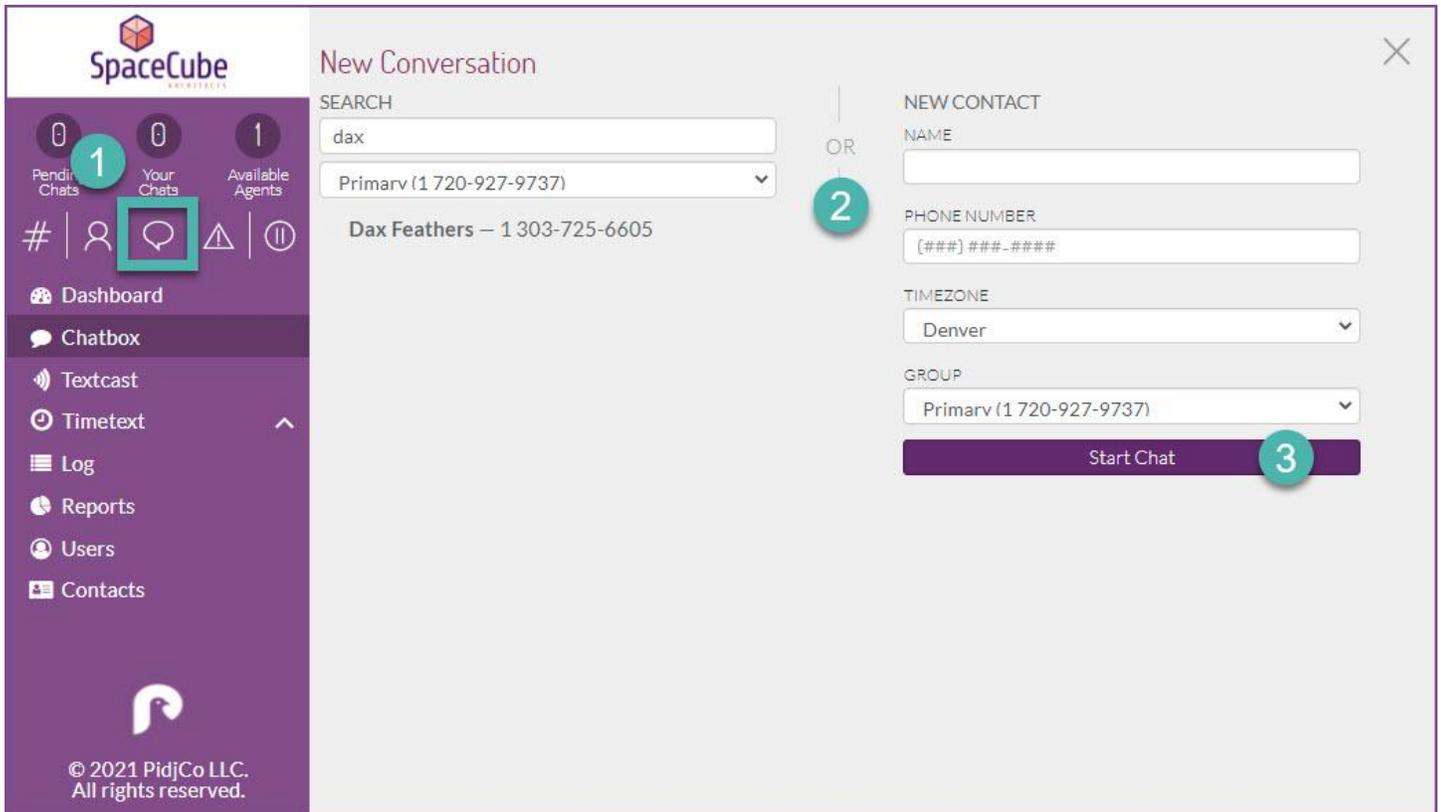
As a business you may want to send a text out to every customer you have, a subset of customers, or perhaps simply begin a conversation with a single customer. Pidj has you covered for every scenario.

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.

The screenshot displays the SpaceCube Textcasts interface. On the left is a purple sidebar with navigation options: Dashboard, Chatbox, Textcast (highlighted with a green circle '1'), Timetext, Log, Reports, Users, and Contacts. At the top of the sidebar are statistics for Pending Chats (0), Your Chats (0), and Available Agents (1). The main content area is titled 'Textcasts' and includes a 'SELECT RECIPIENTS' section with a 'CRITERIA' dropdown set to 'Tag' and a 'member' filter. Below this are buttons for 'ADD CRITERIA' and 'BULK NUMBER ADD', and three toggle options: 'MATCH ALL CRITERIA' (checked, with a green circle '2'), 'REVIEW RESULTS/MULTI-SEARCH', and 'USE FUTURE RECIPIENT RESULTS'. A 'Search' button is also present. The bottom section, titled 'Textcasts', shows a 'TEXTCAST TEMPLATE FORM' dropdown, a 'MESSAGE' box containing a text message, and a 'Form Variables' section with a 'SEND FROM' dropdown set to 'Primarv (1 720-927-9737)'. To the right of the message box are 'TIMETEXT' and 'MMS' toggle buttons, and a list of 24 recipients with phone numbers and names, each with a delete icon (marked with a green circle '3'). A 'Send!' button is at the bottom of the form.

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.

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

minutes

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

The screenshot shows the SpaceCube Timetext interface. On the left is a purple sidebar with navigation icons and labels: Pending Chats (0), Your Chats (0), Available Agents (1), Dashboard, Chatbox, Textcast, Timetext (selected), One Time (1), Forms, Reminders, Series, Calendar, Log, Reports, Users, and Contacts. At the top right, the user name 'Erik' is visible. The main content area features a calendar view from April to December 2021. Below the calendar is a form for scheduling a text message. The form is divided into two main sections: 'RECIPIENT & SENDER' and 'SCHEDULED TEXTS'. The 'RECIPIENT & SENDER' section includes a search field, a contact dropdown (currently showing 'Dax Feathers - 1 303-725-6605'), a timezone dropdown (currently showing 'Denver (-6:00)'), and a send from dropdown (currently showing 'Primarv (1 720-927-9737)'). The 'SCHEDULED TEXTS' section includes an event label dropdown (currently showing 'For Reference Only (Optional)'), a time from now dropdown (currently showing 'minutes'), an at date/time dropdown (currently showing '2021-05-31 1:00 pm'), a template dropdown, and a message text area (currently showing 'Hey Dax - Happy Memorial Day from your friends at SpaceCube! Thanks for being a valued customer.'). A 'Schedule' button is located at the bottom right of the form. Three numbered callouts are present: '1' points to the 'One Time' button in the top navigation bar, '2' points to the contact dropdown, and '3' points to the 'Schedule' button.

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

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.

A. SELECT YOUR FORM
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.

B. UPLOAD CSV FILE
Max 25,000 rows per file. MUST have a header row. For best results, see our details & tips.

C. FIELD TO COLUMN MAP
Select the field that maps to the column of your CSV. Beneath each field is a sample of data from a column for reference.

D. PHONE NUMBER FIELD
phone number

E. REMINDER TIME FIELD(S)
DATE/TIME (COMBINED)
phone number

F. TIMEZONE
The correct timezone is critical when using the send at date/time or when using the send prior to date/time option.
Denver (-6:00)

G. SEND FROM
Primary (1 720-927-9737)

H. ALERTS
ALERT 1 WHEN TO SEND
Time Before Reminder Date/Time
TIME BEFORE REMINDER DATE/TIME
Months: 0-12
Days: 0-30
Hours: 1
Minutes: 0+

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

The screenshot displays the SpaceCube Groups management interface. The main view shows a table of groups with columns for Name, Phone, Voice Forward, Manager, Welcome Message, Farewell Message, Off-Hours Autoreply, and Hold Actions. A 'Create Group' modal is open, showing fields for Name (Field Services), Phone Number (Optional), and Manager (Jeff). The modal also includes sections for Transfers, Schedule Handling, and Off-Hours Handling. Numbered callouts 1-5 highlight key elements: 1. Add Group button; 2. Name field; 3. Phone Number field; 4. Manager field; 5. Schedule Handling section.

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

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.

Untag - this will remove a tag or set of tags

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 'Manage Operation' interface in SpaceCube. The page title is 'Signup Manage Operation'. On the left is a purple sidebar with navigation icons and a list of menu items: 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 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 two input fields containing '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 'Cancel' and 'Save' buttons.

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.

Links

Pidj links allow you to easily create a shortened link that points to a web address of your choice. Once in place, you can easily track clicks allowing you to understand not just deliverability but engagement. Links can be found under the Admin menu in the upper right-hand corner.

To create a new link, simply enter a name for your link, add the web address you would like the Pidj link to point to, and click Create. After a link has been generated, you can easily copy it for use anywhere, or select and add it when creating a new Textcast.

Web Chat

In addition to text messaging, you can communicate with your customers using web chat. With a simple setup, you can quickly create another way your customers can reach you.

Adding the launcher

Web chat can be configured by clicking API under the settings menu in the upper right corner. First, select the group you would like to receive the web chat from the drop down. Then simply embed the code into your website where appropriate.

Web Chat

To enable Pidj Web Chat, add this code to any page you want to feature it on.
We recommend adding it just before the `</body>` tag.

```
<!-- Start Pidj Chat Code (get yours at https://gopidj.com) -->  
<!-- End Pidj Chat Code -->
```

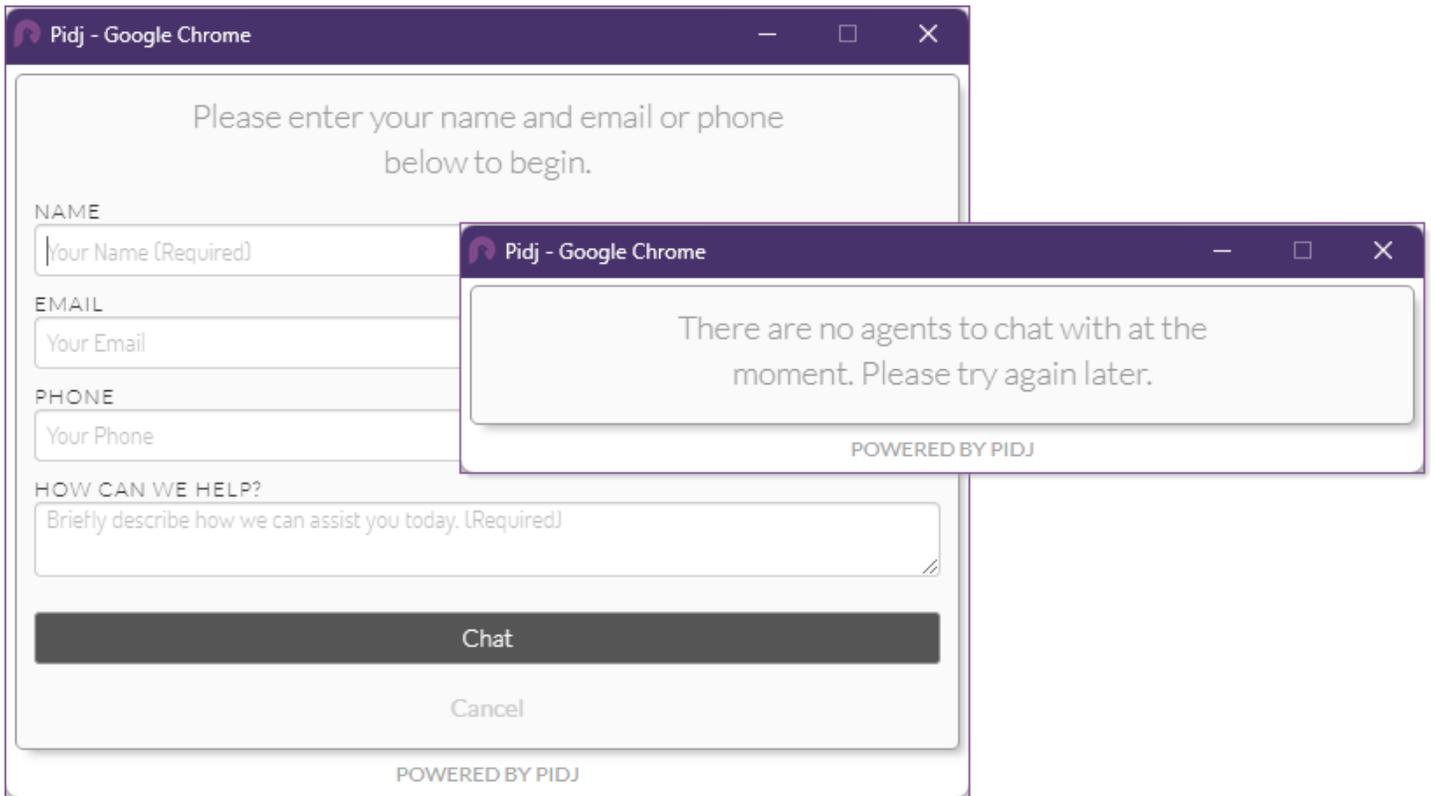
GROUP

Support

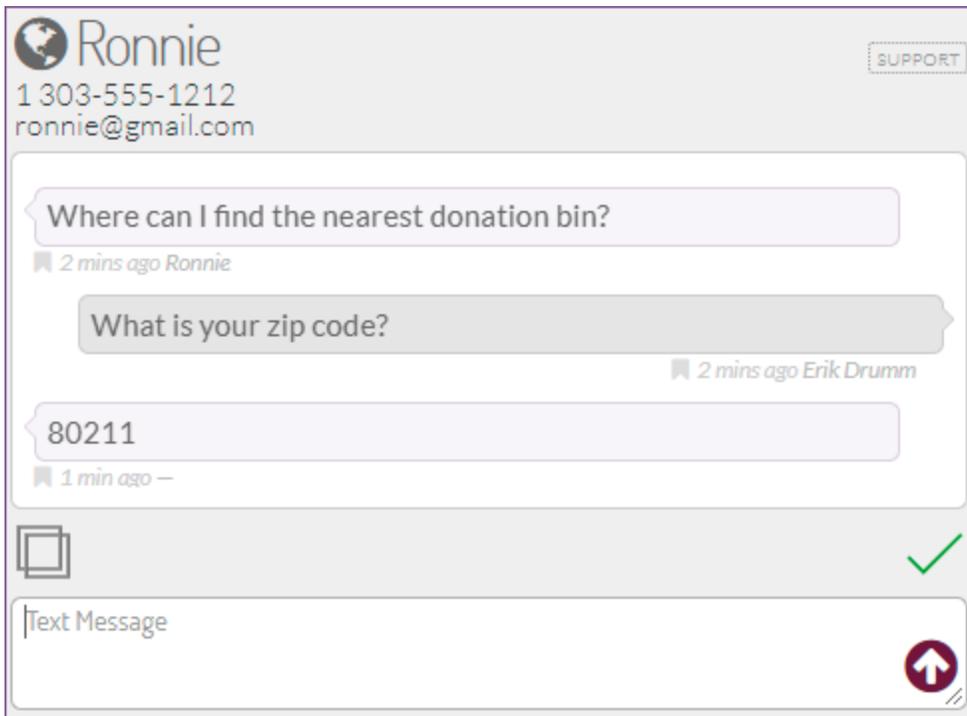
 Copy to Clipboard

Web chat interactions

Web chat interactions are initiated by clicking the icon which is placed by default in the lower right portion of a web page. Users are required to enter basic information prior to starting the chat.



While similar to text interactions, web chat is simplified. While users are still able to transfer chats and access templates, they cannot send or receive pictures or bookmark messages. Users can also manage both text and web chat interactions simultaneously.



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

Text consent allows you to establish opt-in workflows 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. Once in place, you can also initiate or validate text consent from a contact view.