pidj.co

Product Manual

Version 2
August, 2022

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.

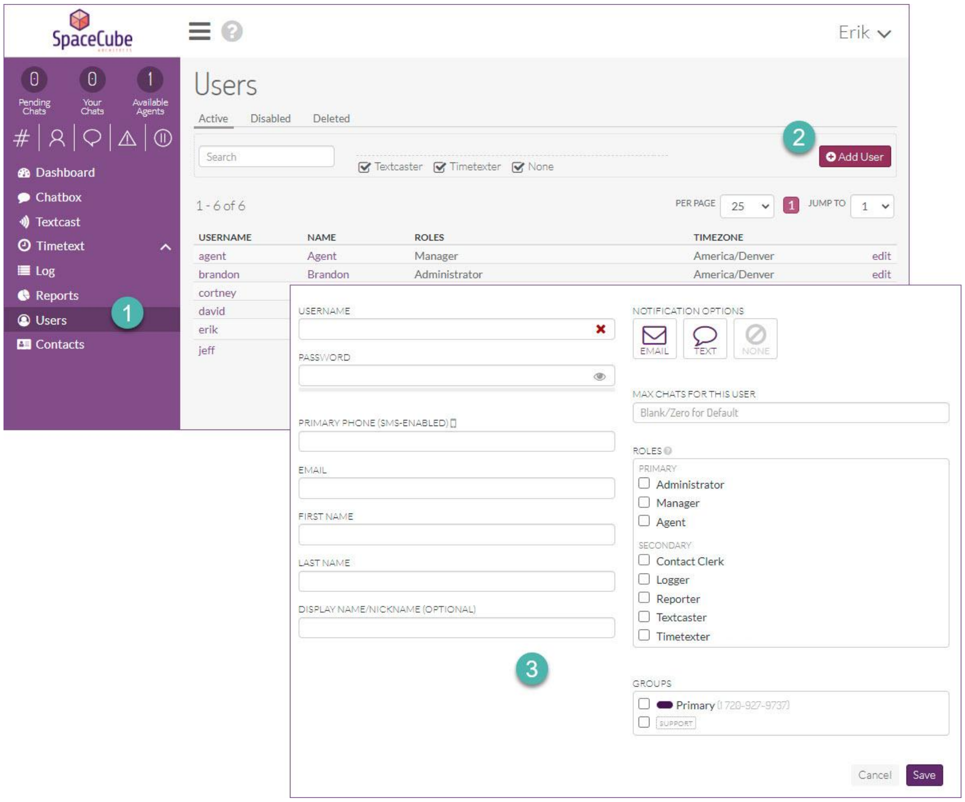
If you have forgotten your password, click the forgotten password link below the login button. Then, enter the email address associated with your user account and follow the reset instructions contained in the system-generated email.

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

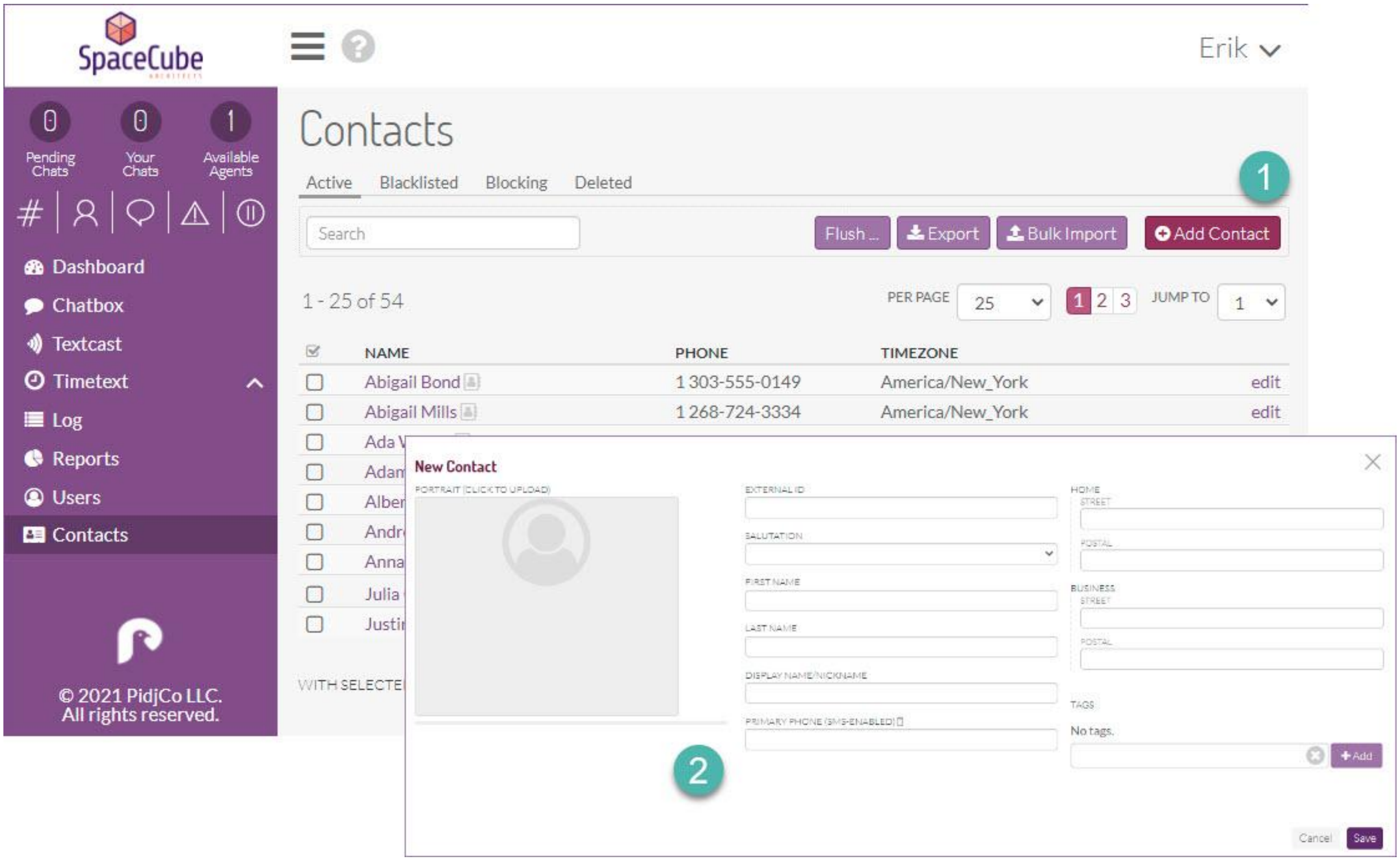
Since your engagement is built around your contacts themselves, knowing how to add and segment contacts is key. Contacts can be found in the left-hand menu.

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.

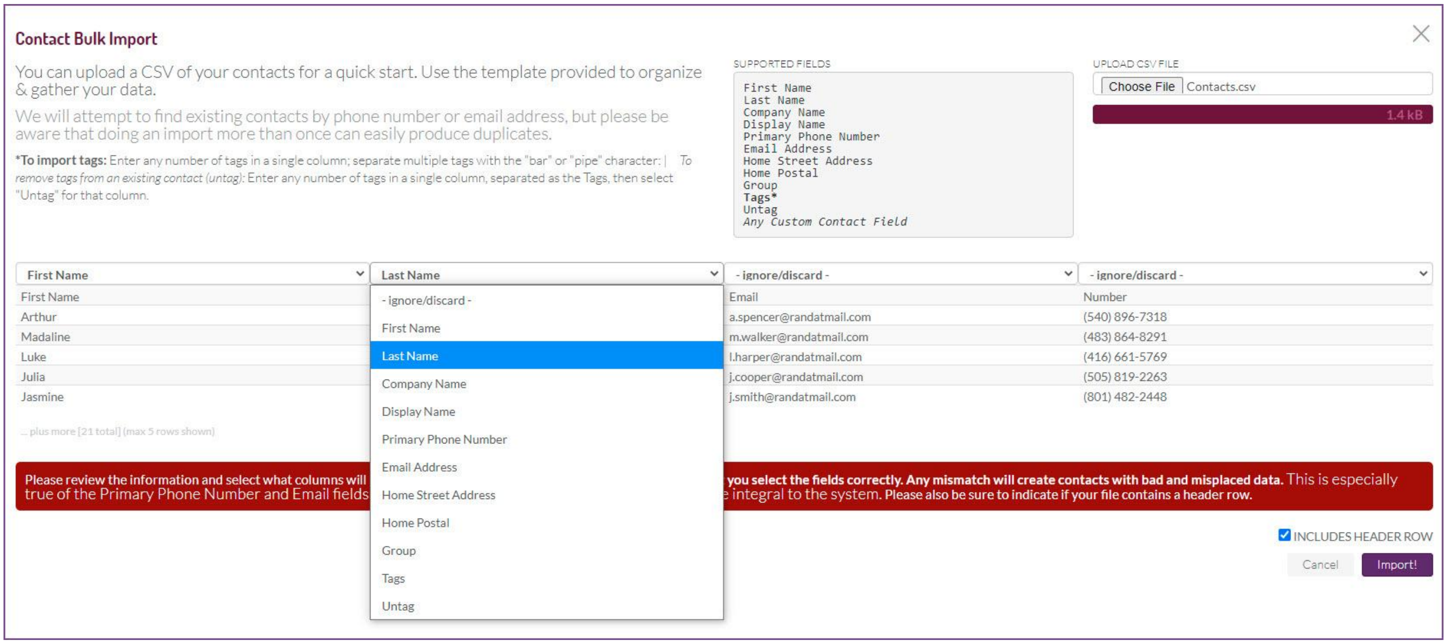


Bulk importing contacts

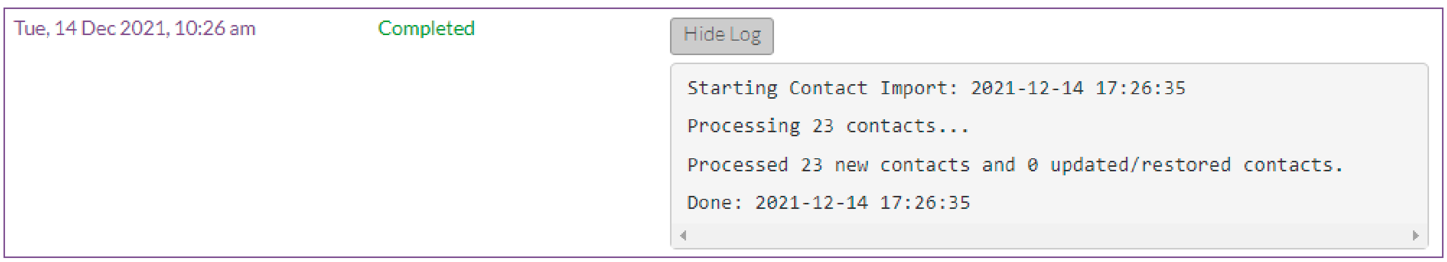
To mass import your contacts:

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



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.



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

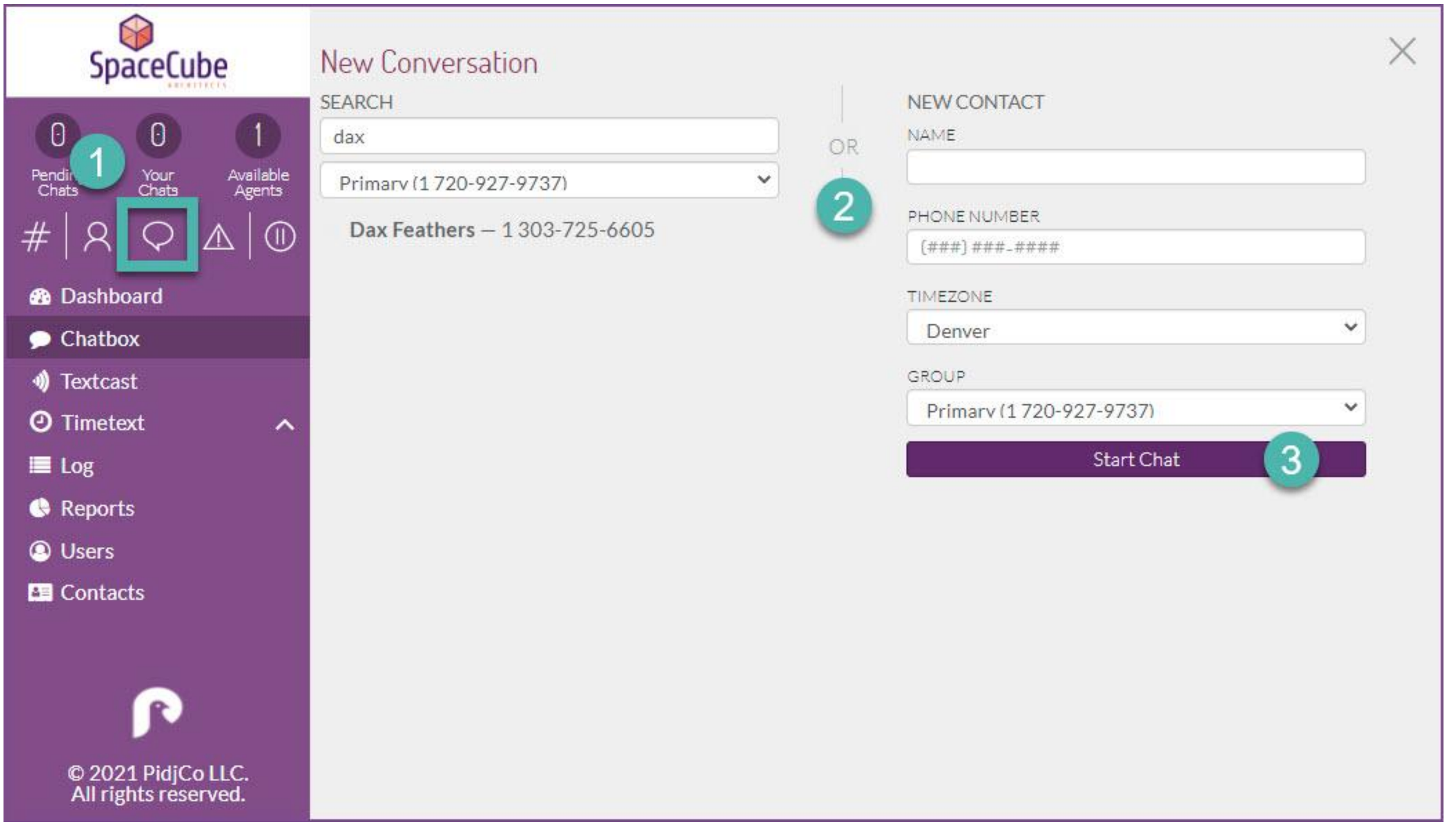
As a business you may want to send a text out to every customer you have, a subset of customers, or perhaps simply begin a conversation with a single customer. Pidj has you covered for every scenario.

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.

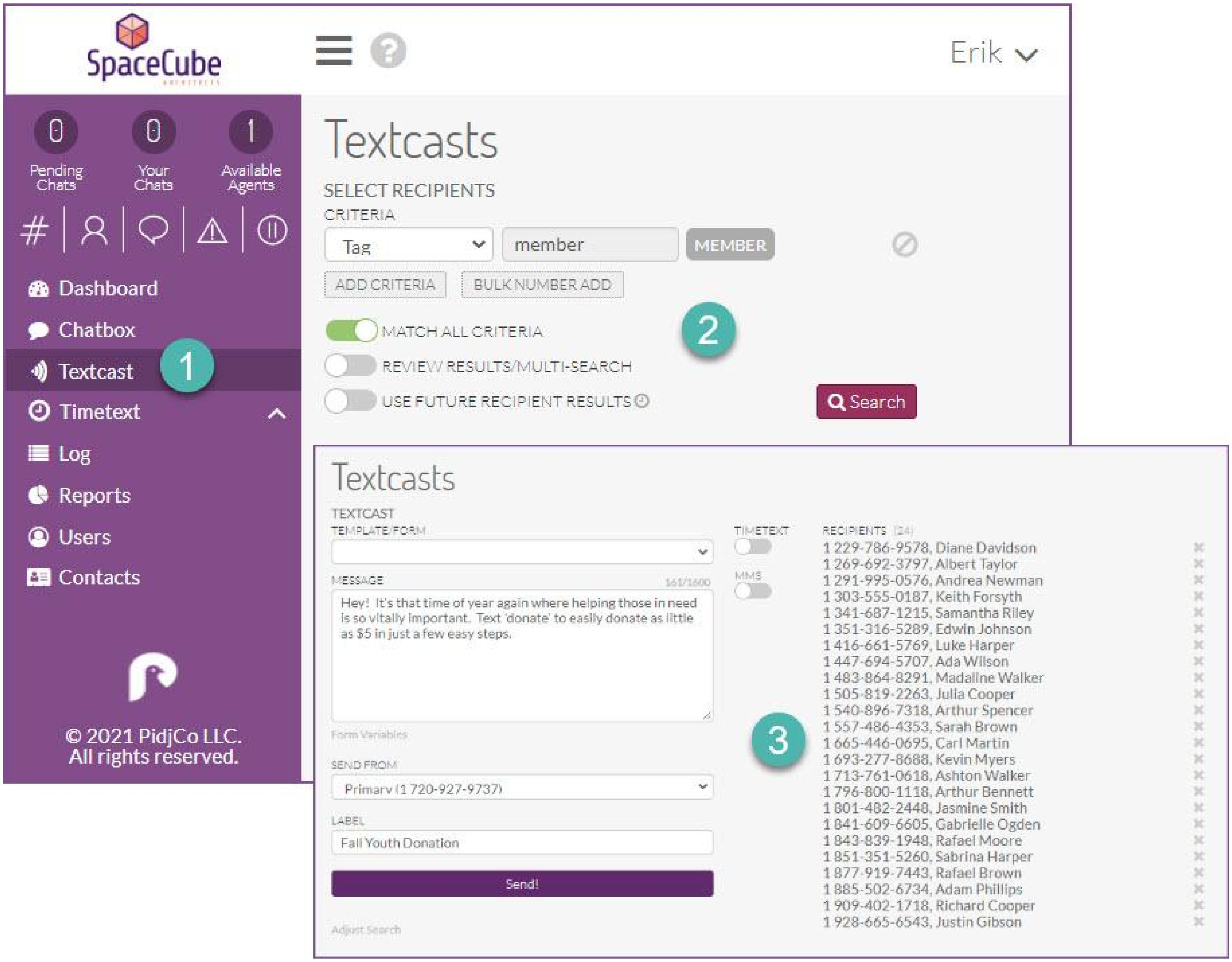
Many contacts - Textcast

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.

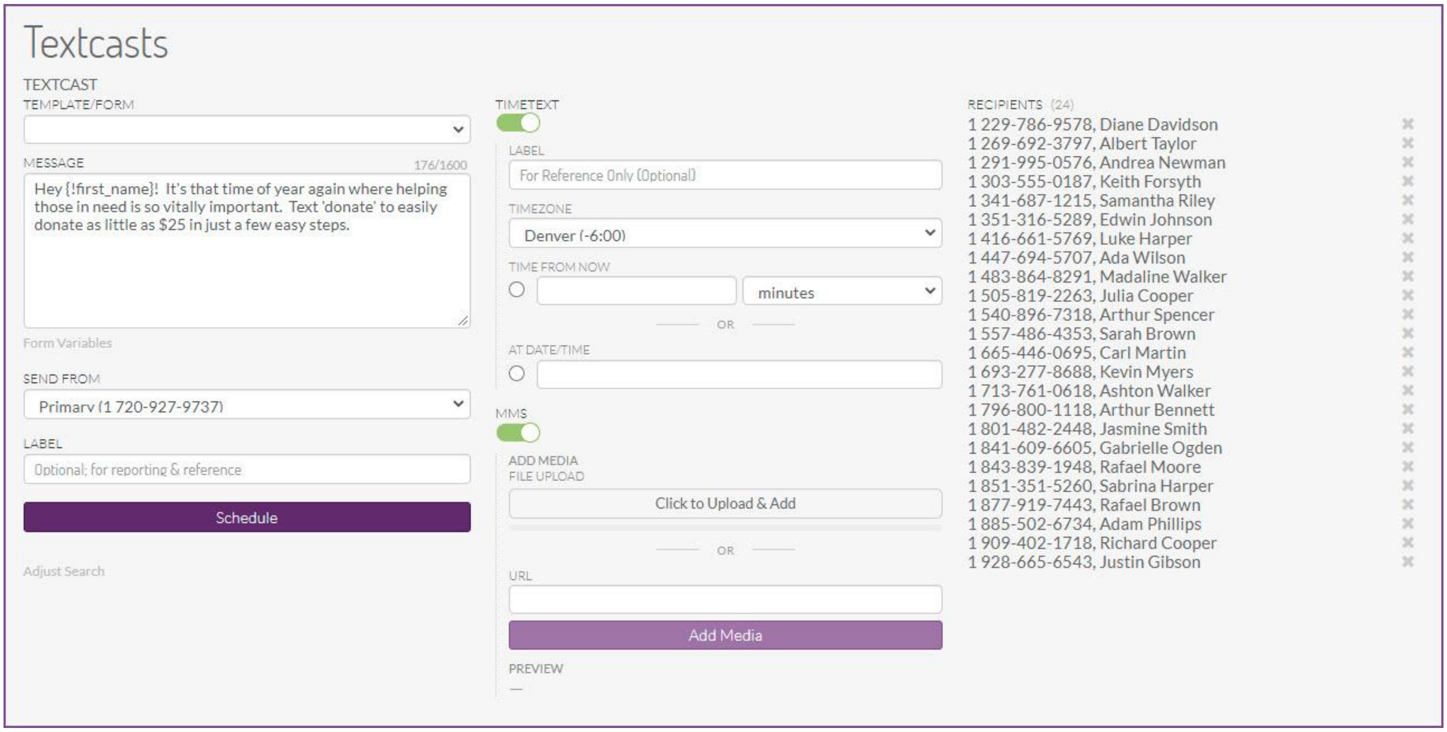
To send a Textcast:

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.



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.



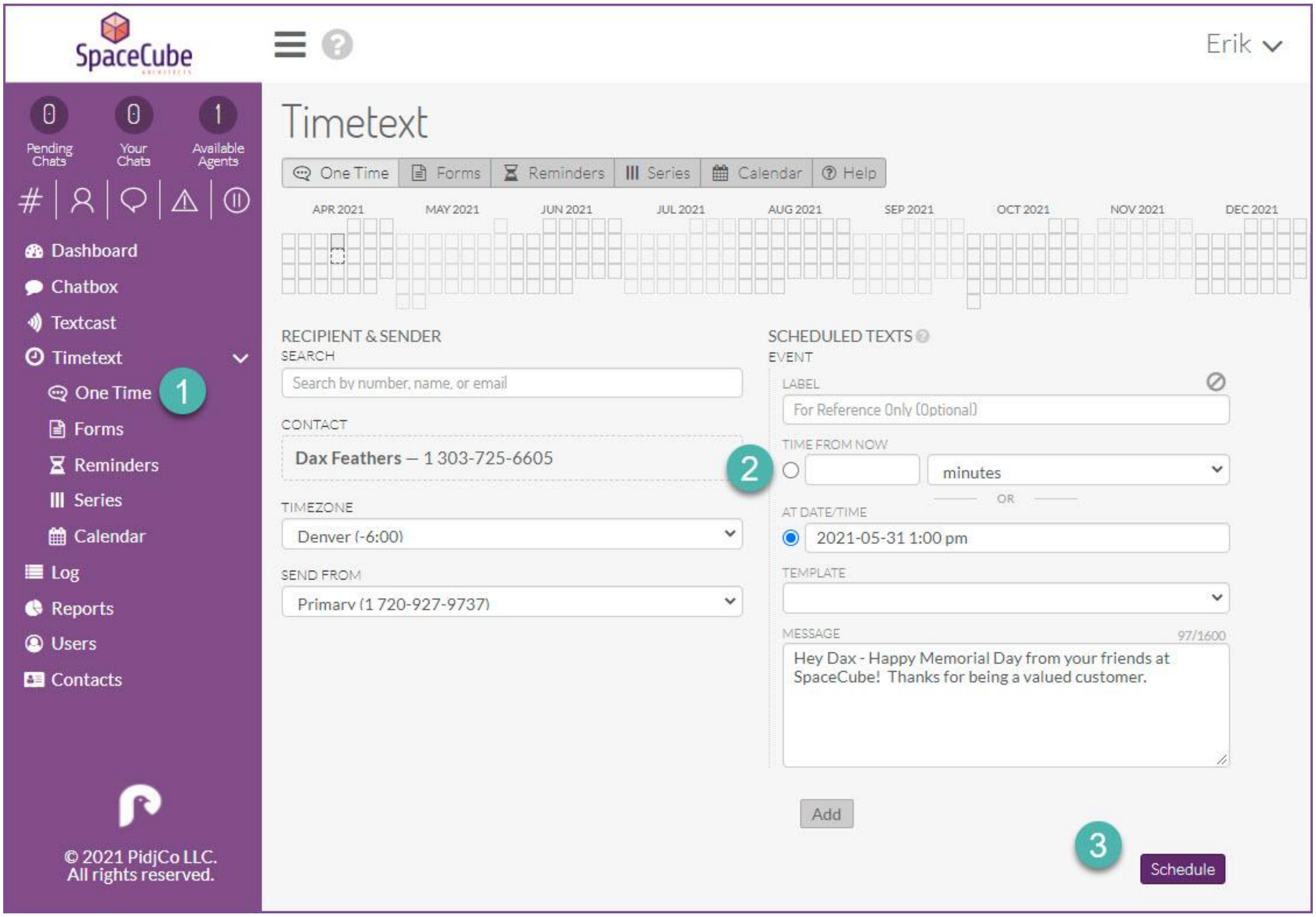
Timetext

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



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

Series

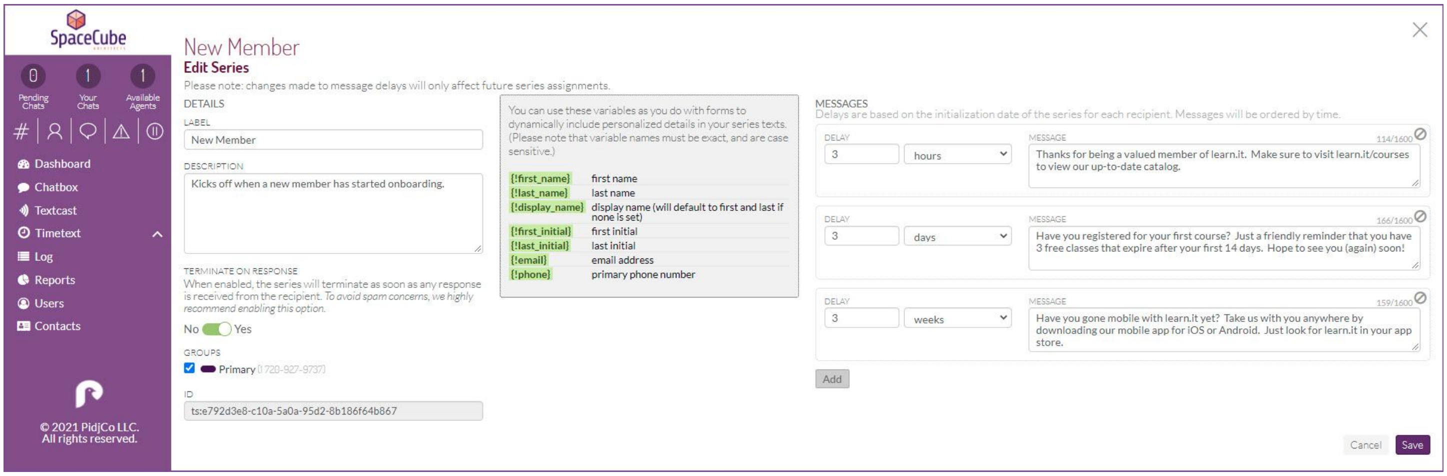
Series can be used to build informational campaigns, nurture leads, or provide an enhanced onboarding experience to your employees or customers.

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.

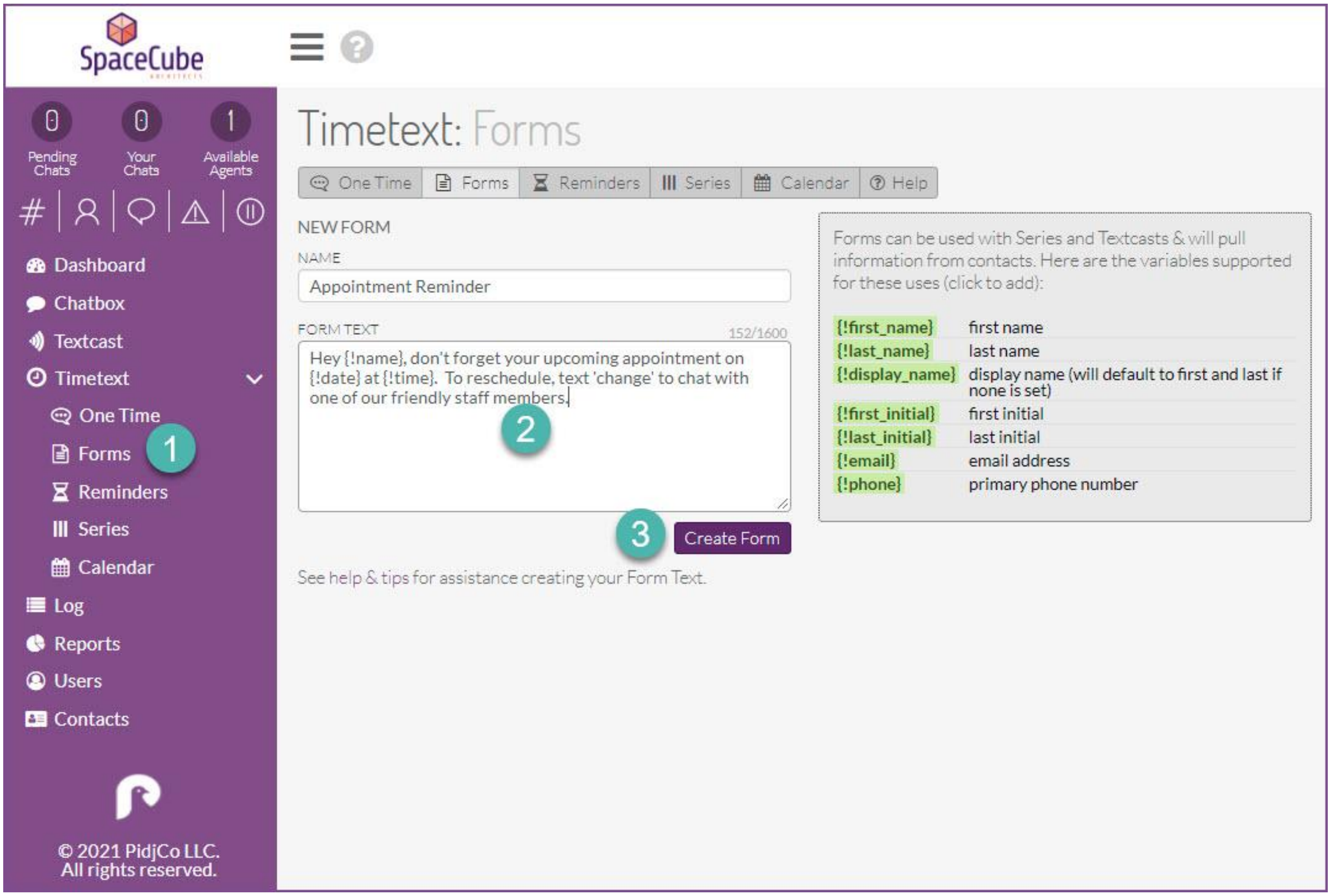
Reminders

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:

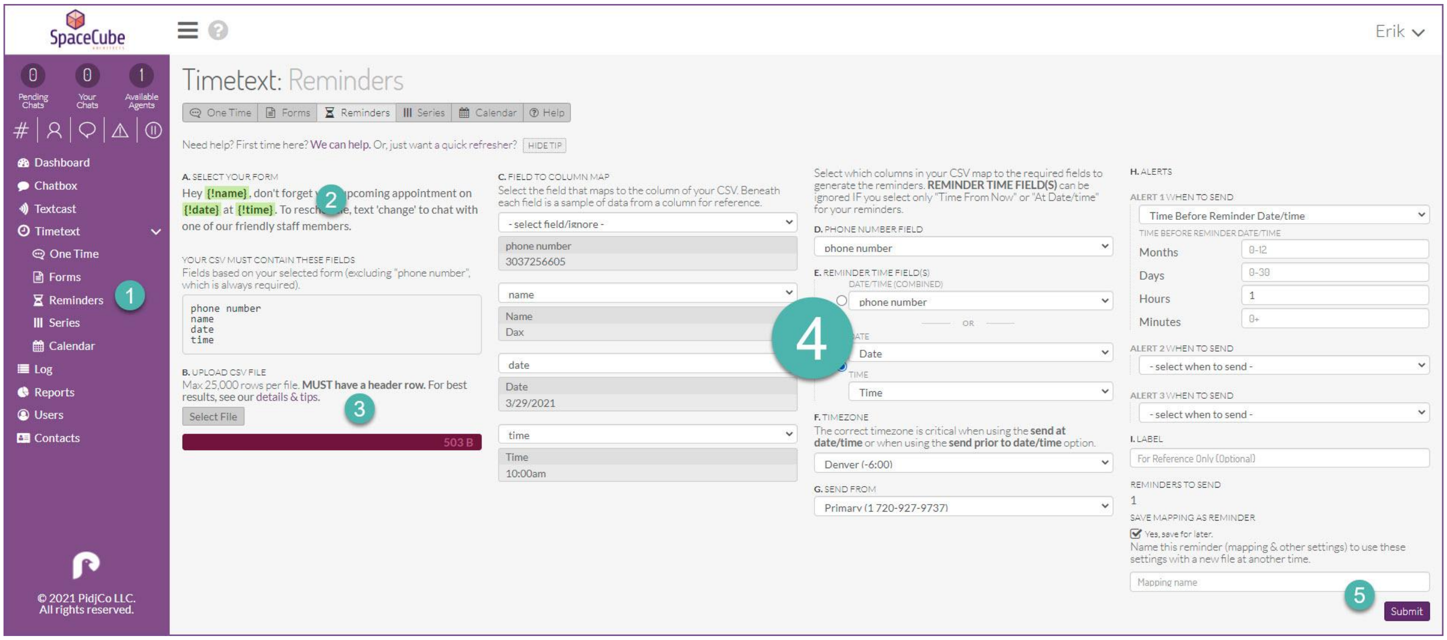
1. Select Forms under Timetext in the left-hand menu.
2. Give the form a name and craft its messaging
3. Click Create Form.



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.



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.

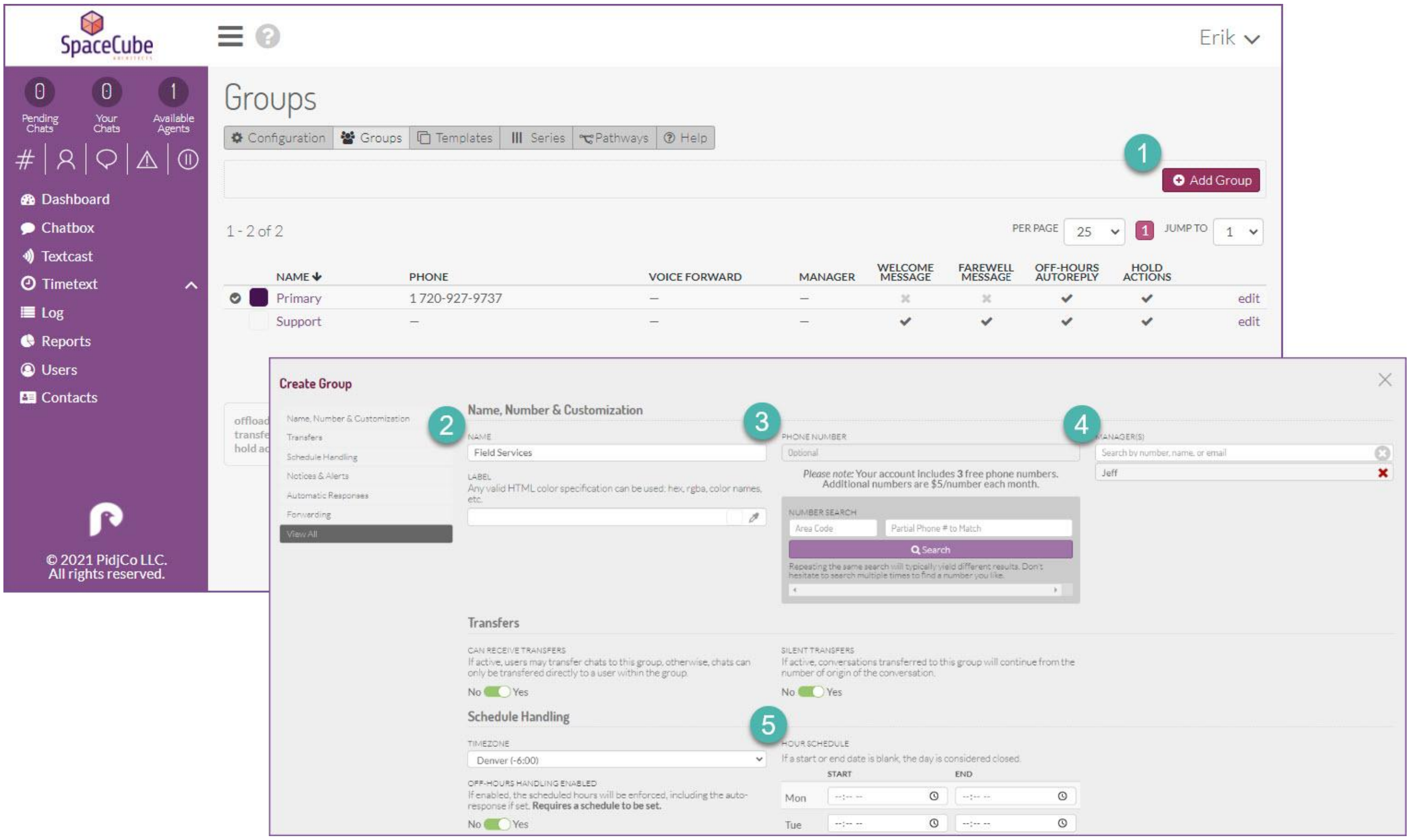
Groups

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



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

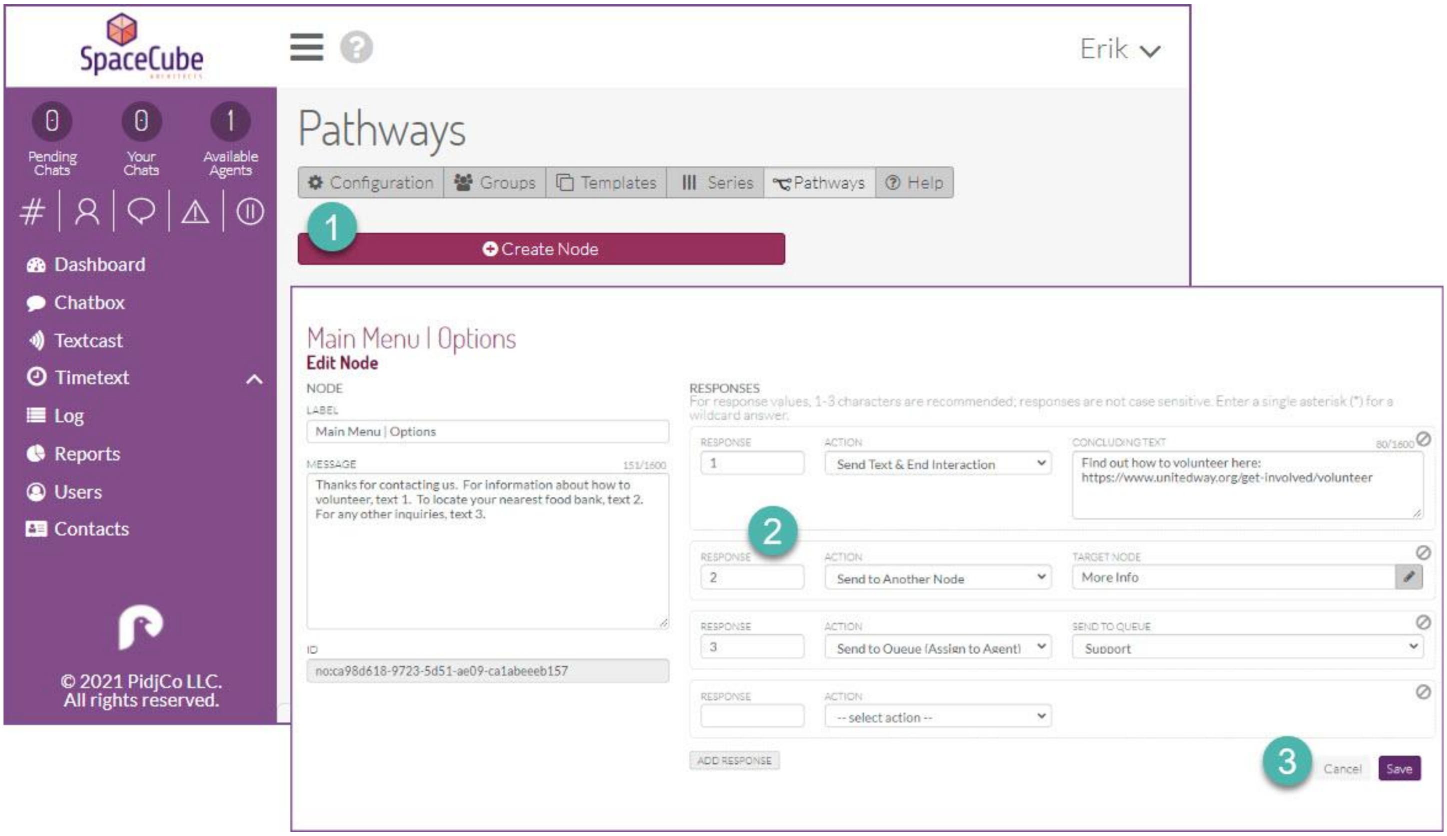
Pathways

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

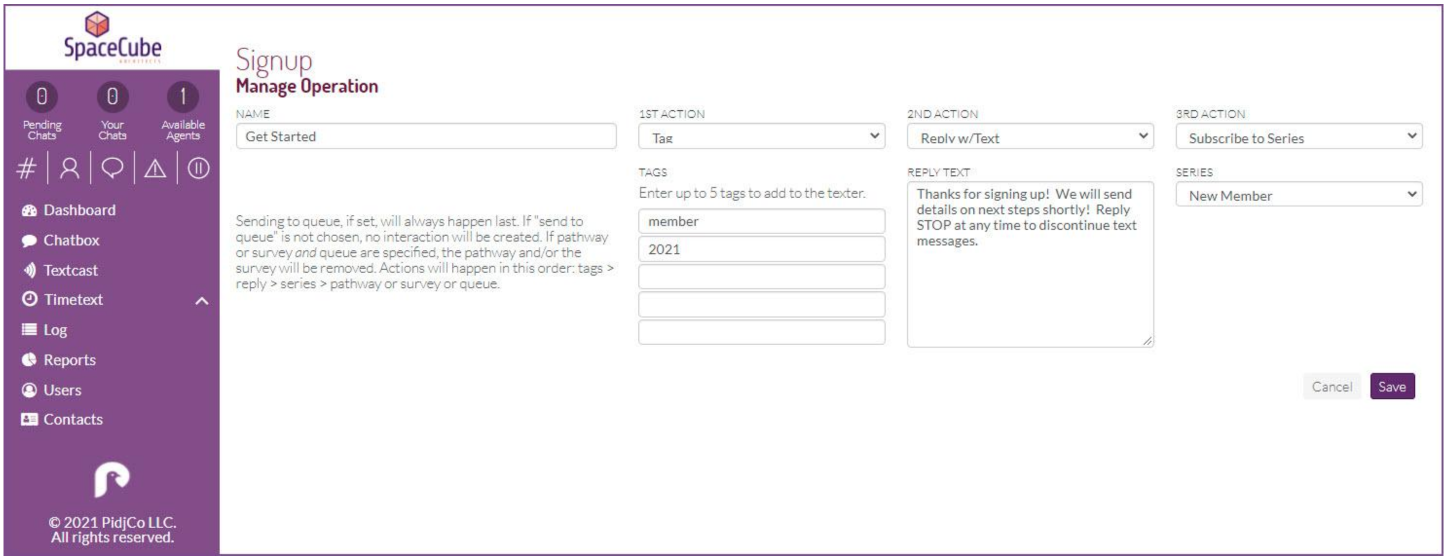
First, you will want to build an operation which is an action or multiple actions set to happen when a keyword is texted. These actions can be:

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.



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.

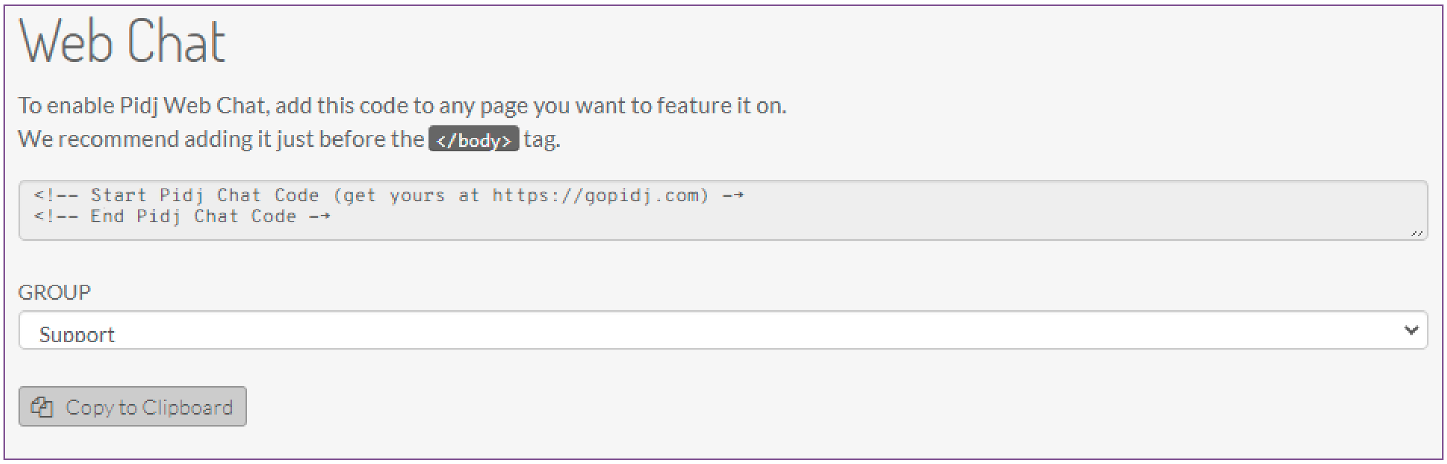
To create a new link, simply enter a name for your link, add the web address you would like the Pidj link to point to, and click Create. After a link has been generated, you can easily copy it for use anywhere, or select and add it when creating a new Textcast.

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.

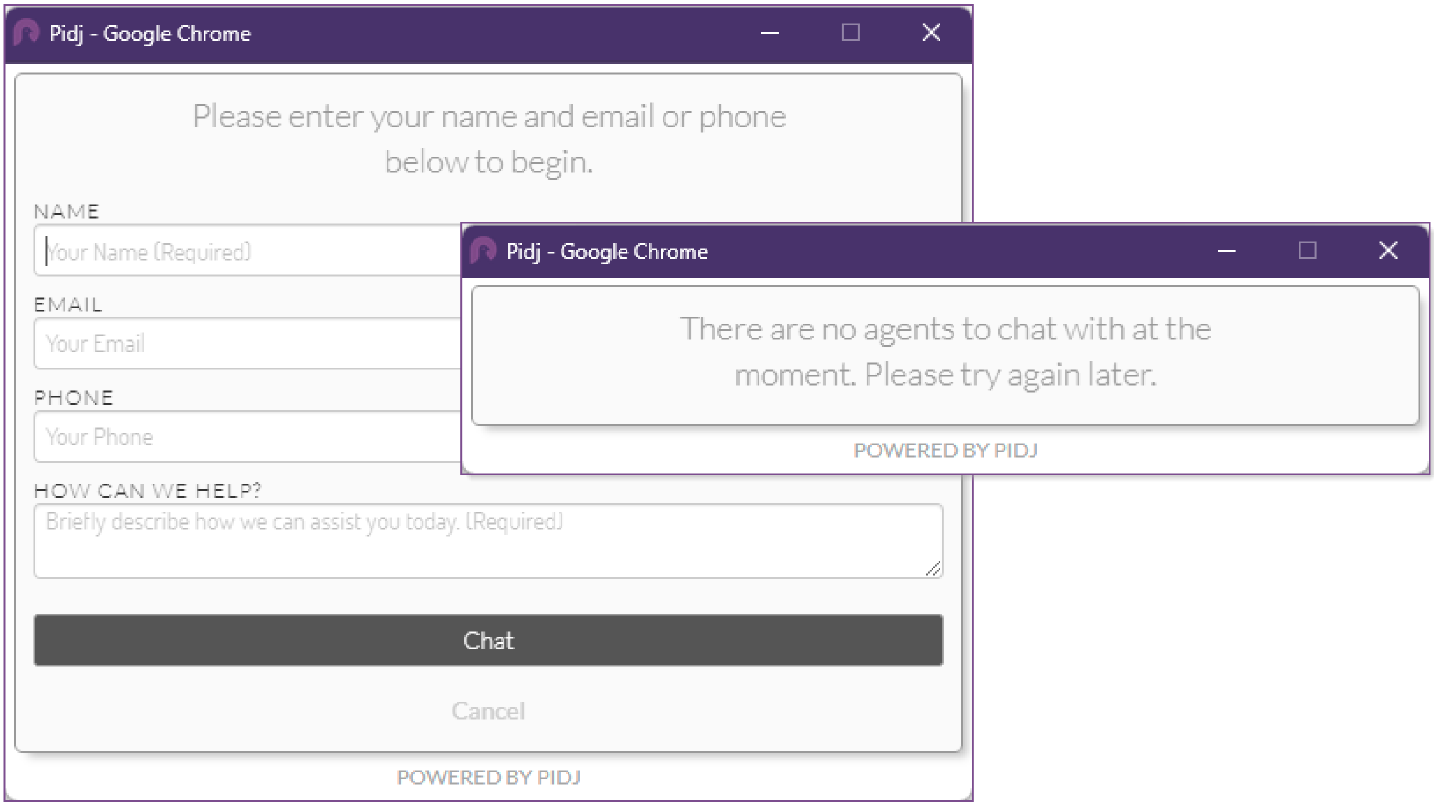
Adding the launcher

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.

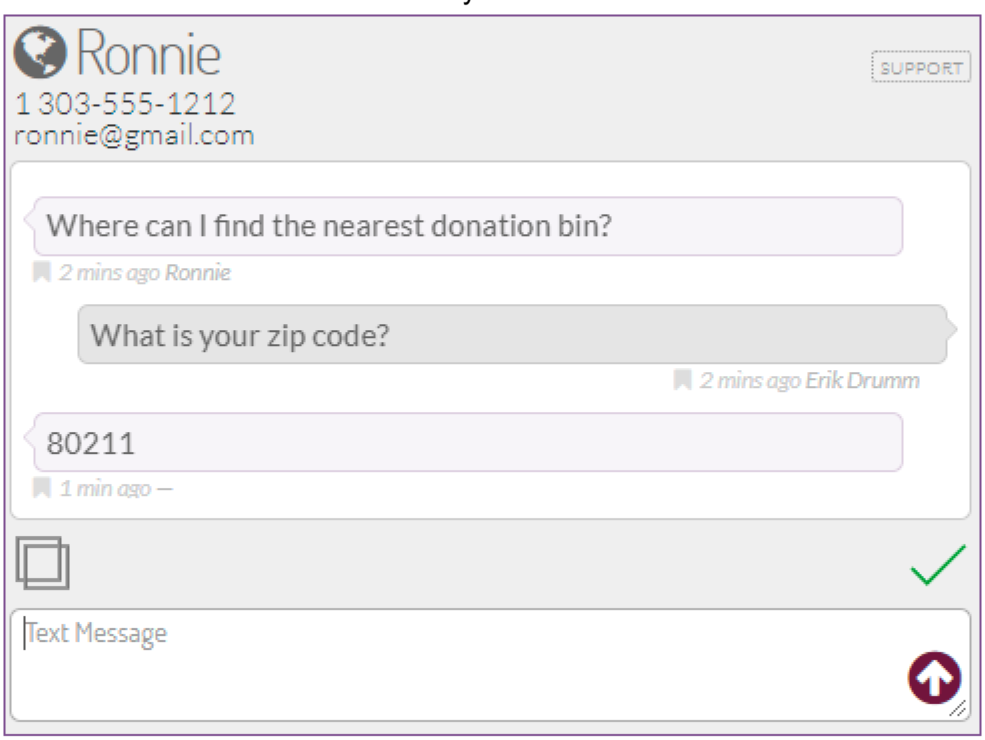


Web chat interactions

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.