



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.

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.

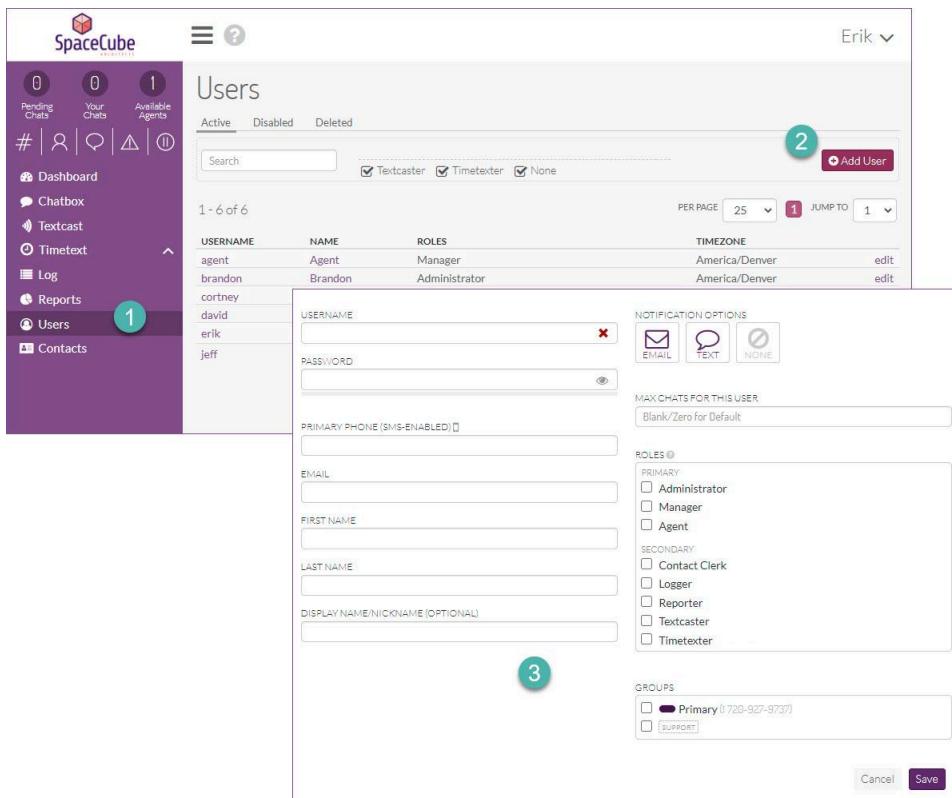
The image shows a login form for SpaceCube ARCHITECTS. At the top is a logo consisting of a purple cube icon above the text "SpaceCube" in a large, bold, purple font, with "ARCHITECTS" in a smaller, orange font below it. Below the logo are two input fields: "USERNAME/EMAIL" with the value "erik" and "PASSWORD" with masked characters "*****". To the right of the password field is an eye icon for toggling visibility. Below these fields is a purple "Login" button with a lock icon. At the bottom of the form is a link that says "Forgot your username or password?". The Pidj logo, a purple bird icon followed by "pidj.co", is at the very bottom.

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.

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Pending Chats 0 Your Chats 0 Available Agents 1

| | | |

Dashboard Chatbox Textcast Timetext Log Reports Users Contacts

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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	
<input type="checkbox"/>	Abigail Bond	1 303-555-0149	America/New_York	edit
<input type="checkbox"/>	Abigail Mills	1 268-724-3334	America/New_York	edit
<input type="checkbox"/>	Ada V			
<input type="checkbox"/>	Adam			
<input type="checkbox"/>	Alber			
<input type="checkbox"/>	Andre			
<input type="checkbox"/>	Anna			
<input type="checkbox"/>	Julia			
<input type="checkbox"/>	Justi			

WITH SELECTED

New Contact

PORTRAIT (CLICK TO UPLOAD)

EXTERNAL ID

SALUTATION

FIRST NAME

LAST NAME

DISPLAY NAME/NICKNAME

PRIMARY PHONE (SM-SUPPORTED)

HOME STREET

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
5. Choose the tag(s) you would like to apply to the imported contacts
6. Check the box to confirm contacts have agreed to messaging and click Import.

*You can alternatively import tags by adding a tags column. Multiple tags should be separated by a pipe bar "|" typically located above the Enter key. Additionally, you can perform wireless number validation on any import by checking the LRN lookup box.

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

The screenshot shows the SpaceCube interface. On the left is a purple sidebar menu with the SpaceCube logo at the top. Below the logo are three circular icons: 'Pending Chats' (0), 'Your Chats' (0), and 'Available Agents' (1). Below these are icons for '#', a person, a speech bubble (highlighted with a green box and a red circle with the number 1), a triangle, and a pause symbol. The menu items listed are 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 area is titled 'New Conversation' and has a close button (X) in the top right. It contains a 'SEARCH' section with a text input field containing 'dax' and a dropdown menu showing 'Primary (1 720-927-9737)'. Below this is the text 'Dax Feathers - 1 303-725-6605'. To the right of the search section is an 'OR' separator and a 'NEW CONTACT' section with fields for NAME, PHONE NUMBER (with a placeholder '([###]) ###-####'), TIMEZONE (a dropdown menu showing 'Denver'), and GROUP (a dropdown menu showing 'Primary (1 720-927-9737)'). At the bottom right of the 'NEW CONTACT' section is a red 'Start Chat' button (highlighted with a red circle with the number 3). A red circle with the number 2 highlights the search input field.

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

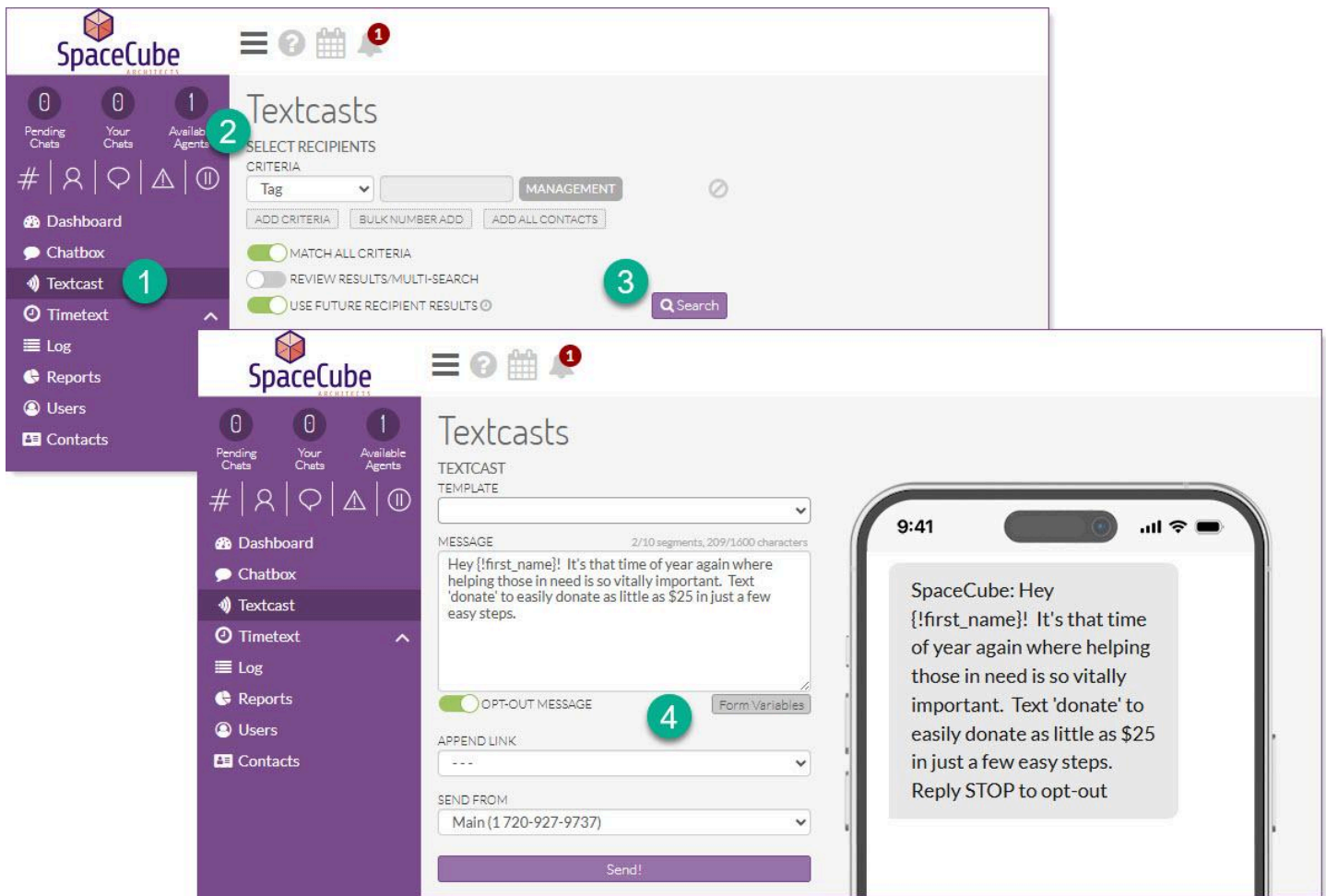
Textcast - Many Contacts

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.

NEW: Use our AI message coach by clicking the wand next to the Form Variables button. Say what you would like your message to be about and have the coach do the rest.

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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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.

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New Member
Edit Series

Please note: changes made to message delays will only affect future series assignments.

DETAILS

LABEL
New Member

DESCRIPTION
Kicks off when a new member has started onboarding.

TERMINATE ON RESPONSE
When enabled, the series will terminate as soon as any response is received from the recipient. To avoid spam concerns, we highly recommend enabling this option.
No ☐ Yes ☒

GROUPS
☒ Primary (720-927-9737)

ID
ts:e792d3e8-c10a-5a0a-95d2-8b186f64b867

MESSAGES
Delays are based on the initialization date of the series for each recipient. Messages will be ordered by time.

Message 1: DELAY: 3 hours. MESSAGE: Thanks for being a valued member of learn.it. Make sure to visit learn.it/courses to view our up-to-date catalog.

Message 2: DELAY: 3 days. MESSAGE: Have you registered for your first course? Just a friendly reminder that you have 3 free classes that expire after your first 14 days. Hope to see you (again) soon!

Message 3: DELAY: 3 weeks. MESSAGE: Have you gone mobile with learn.it yet? Take us with you anywhere by downloading our mobile app for iOS or Android. Just look for learn.it in your app store.

Buttons: Add, Cancel, Save

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.

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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

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

See help & tips for assistance creating your Form Text.

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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 contains 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 '500 B'.
- 4**: Points to the 'C. FIELD TO COLUMN MAP' section, which shows a table mapping CSV fields to form fields. The table has columns for 'Name', 'Dax', 'date', 'time', and 'Time'. The 'name' field is mapped to 'phone number', 'Dax' to '3037256605', 'date' to '3/29/2021', 'time' to '10:00am', and 'Time' to '10:00am'.
- 5**: Points to the 'H. ALERTS' section, which includes 'ALERT 1 WHEN TO SEND', 'ALERT 2 WHEN TO SEND', and 'ALERT 3 WHEN TO SEND'.

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

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

PER PAGE: 25 JUMP TO: 1

Create Group

2 Name, Number & Customization

3 NAME: Field Services

4 PHONE NUMBER: Optional

5

Transfers

Schedule Handling

Off-Hours Handling

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

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Pathways

Configuration Groups Templates Series Pathways Help

1 Create Node

Main Menu | Options
Edit Node

NODE

LABEL
Main Menu | Options

MESSAGE 151/1600
Thanks for contacting us. For information about how to volunteer, text 1. To locate your nearest food bank, text 2. For any other inquiries, text 3.

ID
no:ca98d618-9723-5d51-ae09-ca1abeee157

RESPONSES
For response values, 1-3 characters are recommended; responses are not case sensitive. Enter a single asterisk (*) for a wildcard answer.

RESPONSE	ACTION	CONCLUDING TEXT
1	Send Text & End Interaction	Find out how to volunteer here: https://www.unitedway.org/get-involved/volunteer
2	Send to Another Node	More Info
3	Send to Queue (Assign to Agent)	Support
	-- select action --	

ADD RESPONSE

3 Cancel 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 pre-scheduled series of messages

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

Send contact edit link - sends a web-link for a [page](#) that allows contacts to add/update their information

Send virtual contact file - sends a contact file that recipients can easily store in their phone contacts

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 #, person, speech bubble, and a play button. 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.

Opt-In Pages

Opt-in pages allow your contacts to easily subscribe to receive text messages from your business. Opt-in pages can be found under the Admin menu in the upper right-hand corner.

The screenshot displays the 'Manage Opt-In Page' interface, which is divided into several sections:

- Manage Opt-In Page:**
 - Override Logo:** A section for uploading a logo. It includes a 'Select File' button and a note: 'Upload a cropped and ready logo. Please note that the ideal size is 400 px x 118 px (aspect ratio 3.39:1). The file will be used as is.'
 - Title:** A text input field containing 'SpaceCube Text Club'. A green circle with the number '1' is next to it.
 - Description:** A text area containing 'Please submit your information to stay 'in the know' about upcoming products, projects, and more.' A green circle with the number '2' is next to it.
 - Fields:** A section with toggle switches for various fields: PHONE NUMBER, EMAIL ADDRESS, FIRST NAME, LAST NAME, BIRTHDAY, BUSINESS NAME, SKILL, and VEHICLE. A green circle with the number '3' is next to the BUSINESS NAME toggle.
 - Topics:** A section for topic tags. It includes a 'Filter tags...' input and a list of tags: CUSTOMER, MANAGEMENT, and STAFF.
 - Auto-Assign Tags:** A section for auto-assigning tags. It includes a 'Filter tags...' input and a note: 'Tags to assign to all contacts that opt-in. No tags added.'
- Links:** A section with a URL: <https://pidjdemo.gopidj.com/xojqgqp>. A green circle with the number '4' is next to it.
- Mobile Preview:** A preview of the opt-in page on a mobile device. It shows the SpaceCube logo, the title 'SpaceCube Text Club', the description, and the form fields for PHONE NUMBER, EMAIL ADDRESS, FIRST NAME, and LAST NAME, followed by a 'Submit' button.

Creating Opt-In Pages

1. Create a new page by clicking Add Page
 - Enter a descriptive title for your opt-in page.
 - Add a clear description to communicate what contacts will receive by subscribing.

Optional: you can override your primary organization's logo and submit button color to customize opt-in branding.
2. Choose the information you'd like to collect from the subscriber
 - Select the contact information you want subscribers to provide (e.g., name, phone number, email, custom fields).
 - Limit fields to essential data to simplify subscription and maximize opt-in rates.
3. Managing Tags and Topics
 - Apply tags automatically to new contacts upon submission for easy segmentation.

- Optionally, you can allow subscribers to choose topics of interest, enabling more personalized engagement.

Sharing Your Page

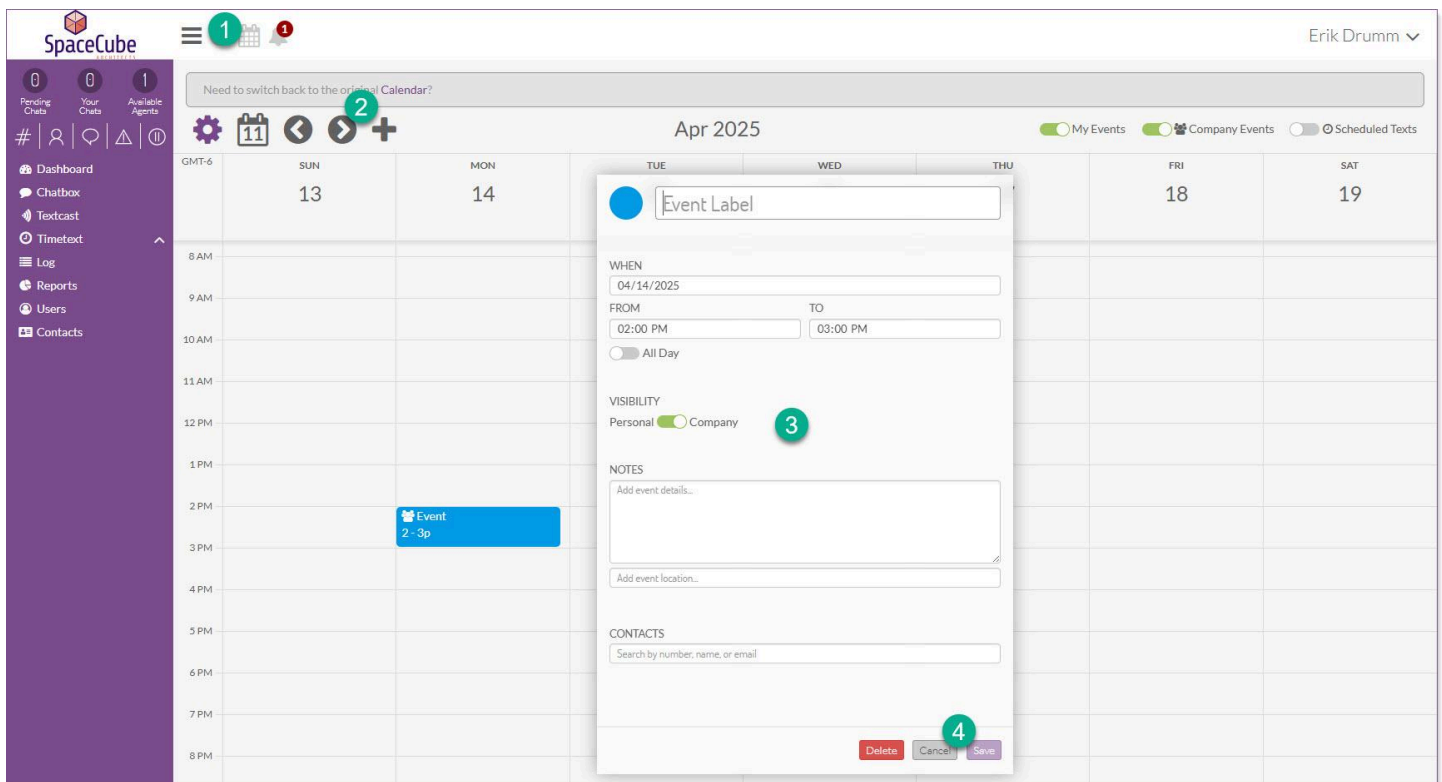
Once saved, use the provided URL or QR code to share your opt-in page. Alternatively, you can embed the page directly into your website using the provided iframe code.


Note: Once a subscriber submits their information, they will receive a confirmation text message asking them to verify their opt-in. Contacts will not be fully subscribed without replying YES to this message.

Calendar

Scheduling

You can easily add and modify company or personal events, meetings, and appointments and associate them with contacts using the Pidj calendar.



1. Click the  Calendar icon in the top toolbar
2. Create a new event by clicking on a time slot or the '+' button at the top.
3. Enter event details such as event type, name, location, notes, and associated contact and click **Save**.
4. Use drag-and-drop to easily adjust events to new dates and times.
5. To update, click on an event, modify details, and click **Save**. To delete, select the event and choose **Delete**.

Note: you can also create events directly from a specific contact.

Customization

You can easily adjust what your calendar displays using the toggles at the top right corner of the calendar. You can choose to show or hide your personal or company events as well as show or hide any scheduled text message.

Automation

Automate your event-related communications to save time and improve customer engagement.

The screenshot shows the 'Automations' management interface. On the left is a sidebar with a '1 Available Agents' indicator and a list of automation labels. The main area is titled 'Manage Automation' and contains several fields: 'LABEL' (New Patient Appointment Reminder), 'SOURCE' (Calendar), 'TRIGGER' (2 hours before an event starts), and 'GROUP' (Default). An 'Update' button is at the bottom left. The 'MESSAGE' field contains a template: 'Hi {!contact_name}! This is a friendly reminder of your {!event_label} in 2 hours at {!event_location}. We look forward to seeing you!'. Below the message is a list of supported variables: {!contact_name} (contact name), {!event_label} (event label), {!event_datetime} (event date & time), and {!event_location} (event location). On the right, 'CALENDAR EVENT TYPES' are listed with checkboxes: 'New Patient' (checked), 'Follow Up', and 'Ortho Consult'. A 'SELECTED ALL' toggle is also present.

1. Navigate to **Automations** in the **Settings** menu.
2. Click **Add Automation** and provide a name for your automation.
3. Select **Calendar** as the source and configure your trigger and timing preferences.
4. Design your message template using event variables (such as contact name, event details).
5. Assign the automation to all or specific event types and click **Save**.

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.

Pidj - Google Chrome

Please enter your name and email or phone below to begin.

NAME
Your Name (Required)

EMAIL
Your Email

PHONE
Your Phone

HOW CAN WE HELP?
Briefly describe how we can assist you today. (Required)

Chat

Cancel

POWERED BY PIDJ

Pidj - Google Chrome

There are no agents to chat with at the moment. Please try again later.

POWERED BY PIDJ

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.

Ronnie
1 303-555-1212
ronnie@gmail.com

SUPPORT

Where can I find the nearest donation bin?

2 mins ago Ronnie

What is your zip code?

2 mins ago Erik Drumm

80211

1 min ago —

Text Message

✓

↑

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.

Portal Branding & Customization

Pidj allows you to easily customize your Pidj portal to match your organization's branding.

Logo: Upload a cropped and ready logo with ideal dimensions of 400 px x 118 px. Ensure your file is prepared, as it will be displayed exactly as uploaded.

Navigation Menu Background: Specify the navigation menu background color using a color code or simply use the embedded color-picker.

Virtual Contact Card: Choose what information you want to be included when sending a virtual contact card.

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.

Contact Direct Edit Page

Easily configure what contact information you want your subscribers to self-manage by editing your Contact Direct Edit page. Choose fields such as email address, name, business name, birthday or any custom contact fields you've created. Then simply add the edit action to a [keyword operation](#).

Compliance

Pidj provides straightforward compliance settings to ensure your text messaging adheres to important regulations, protecting both you and your contacts. Below are the key compliance settings you need to configure in your account.

Sender Information

Sender Name: Identifies to your recipients who the text is from by including your organization's name at the start of each message.

Help Contact Phone: Displayed in auto-reply HELP responses and auto-generated terms of use to guide users who need assistance.

Legal Links

Terms of Use URL: Link recipients directly to your organization's Terms of Use. If left blank, a default terms page will be provided.

Privacy Policy URL: Similarly, link to your organization's Privacy Policy or use the provided default.

Opt-In/Opt-Out Management

Choose whether opt-outs (replying STOP) apply per individual group or across all groups within your organization.

Automated SMS Consent Handling

Enable Automated SMS Consent: Highly recommended for TCPA compliance. This automated feature ensures explicit consent is always confirmed.

Consent Collection: Set to either "New" (only collects consent from new numbers) or "All" (collects consent from all numbers interacting with your account).