pidj.co

Product Manual

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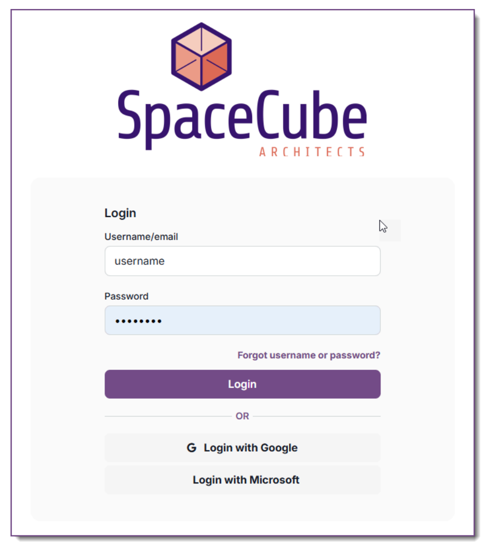
Introduction

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

Campaigns - Send targeted messages (SMS/RCS/Email) to different audience segments based on their unique demographics
Automation - Automatically send text message confirmations, reminders, follow-ups, changes, and cancellation notices to contacts
Inbound Text Routing - Route inbound text communication to automated responses or your inboxes for 1/1 or group interaction
Keywords - Trigger an action or set of actions when a contact texts in specific word
Chatbox - 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.

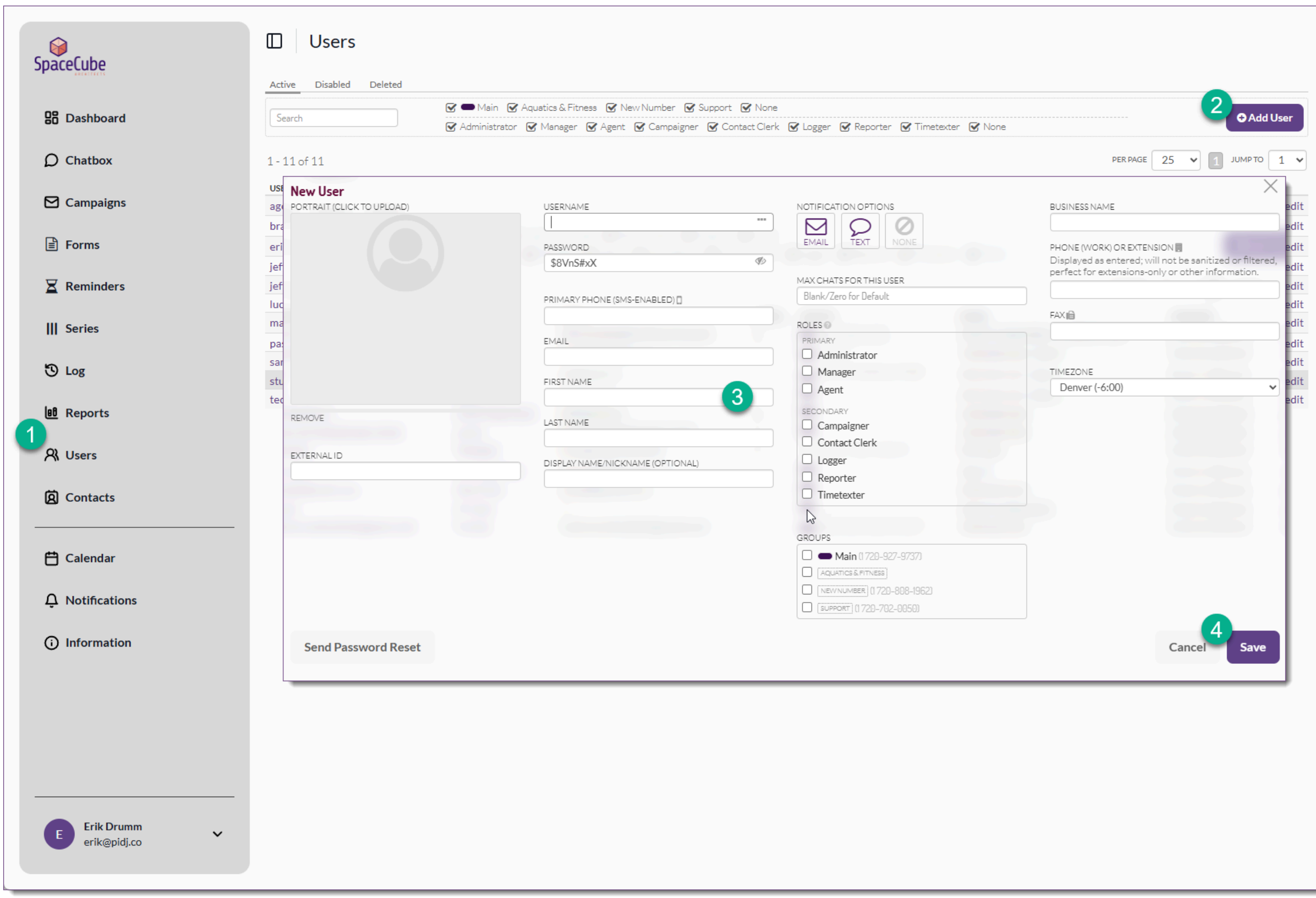
If you have forgotten your password, click the forgotten password link below the login button. Then, enter the email address associated with your user account and follow the reset instructions contained in the system-generated email.

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.
4. Click Save.



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.

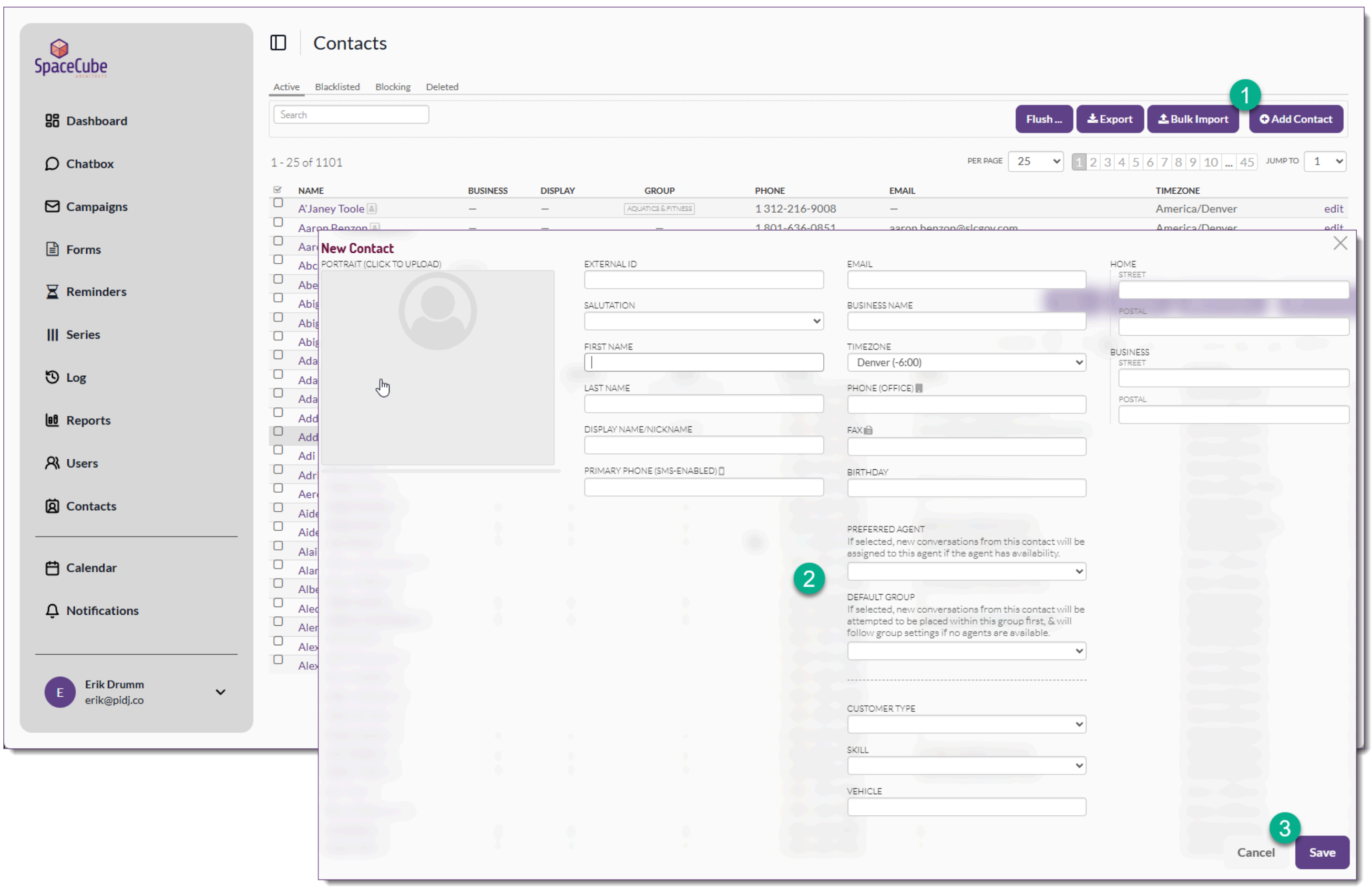
Adding Contacts

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 navigation 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.
3. Click Save.



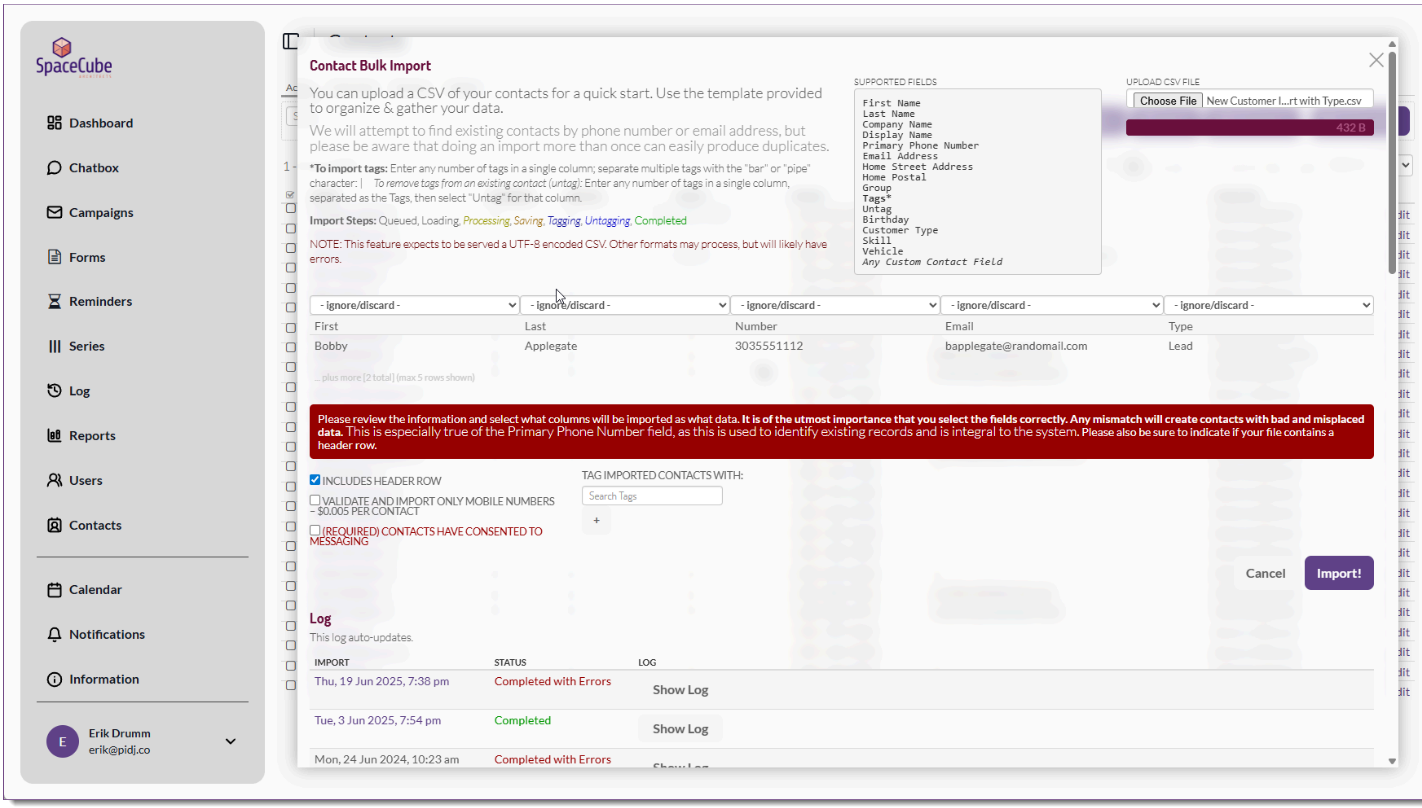
Bulk importing contacts

To mass import your contacts:

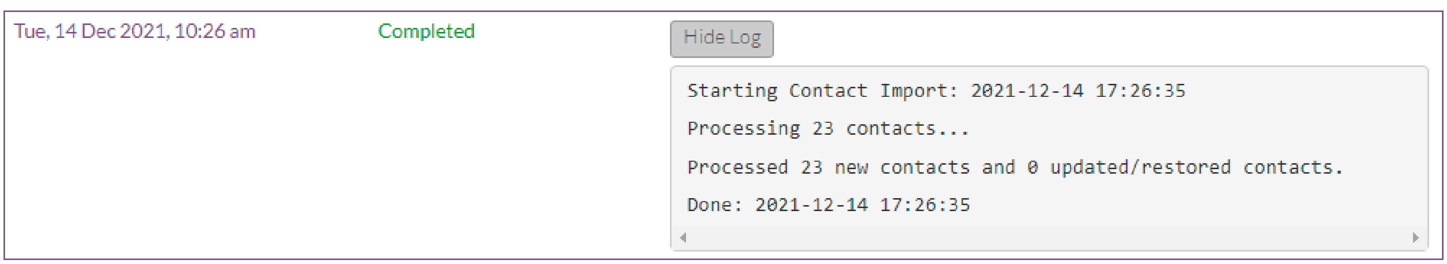
1. Export them from their current location and save the file as a .csv
2. From the Contacts screen, select Bulk Import
3. Choose the .csv file you have saved
4. Map the field names in your list to the field names in Pidj
5. Choose and/or create the tag(s) you would like to apply to the imported contacts

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 choose to validate and import mobile numbers only.



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)

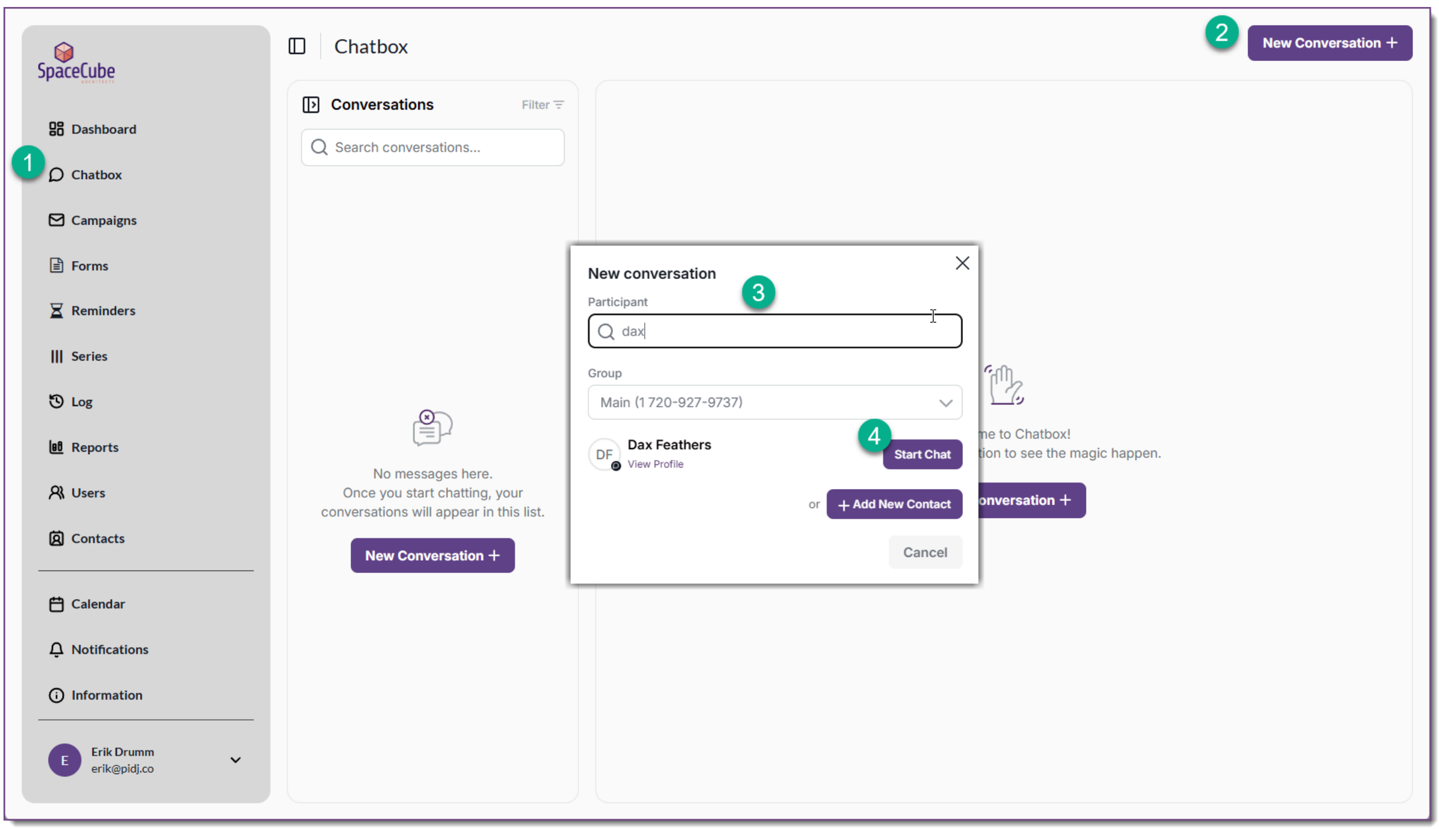
Sending Messages

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 **Chatbox** from the navigation menu on the left.
2. Click **New Converstion +**
3. Search for an existing contact or **Add New Contact**
4. Click **Start Chat**



Campaigns - Many Contacts

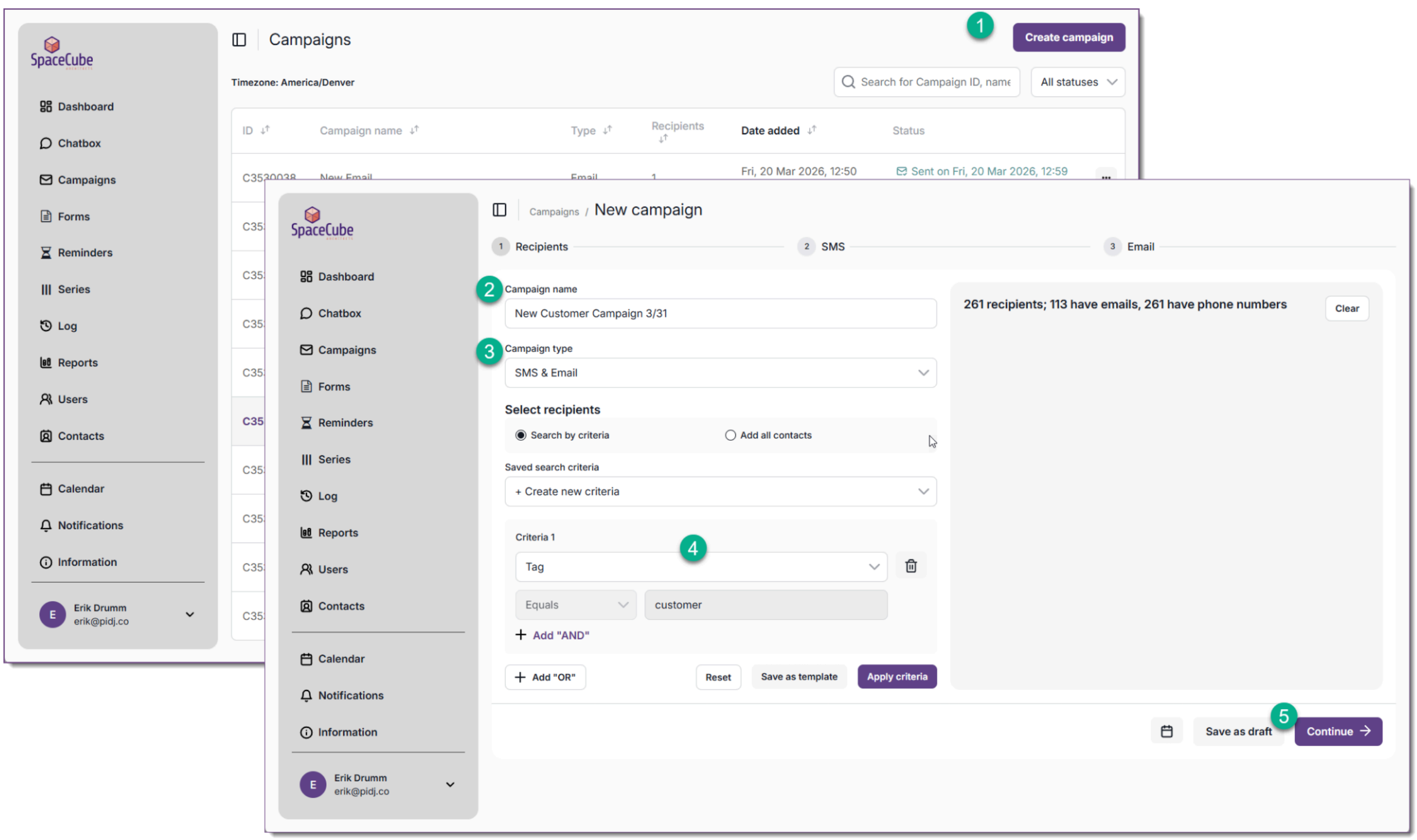
Campaigns make it easy to reach your audience by SMS, email, or both as well as RCS — all in one workflow.

To send a Campaign:

Step 1: Start a New Campaign

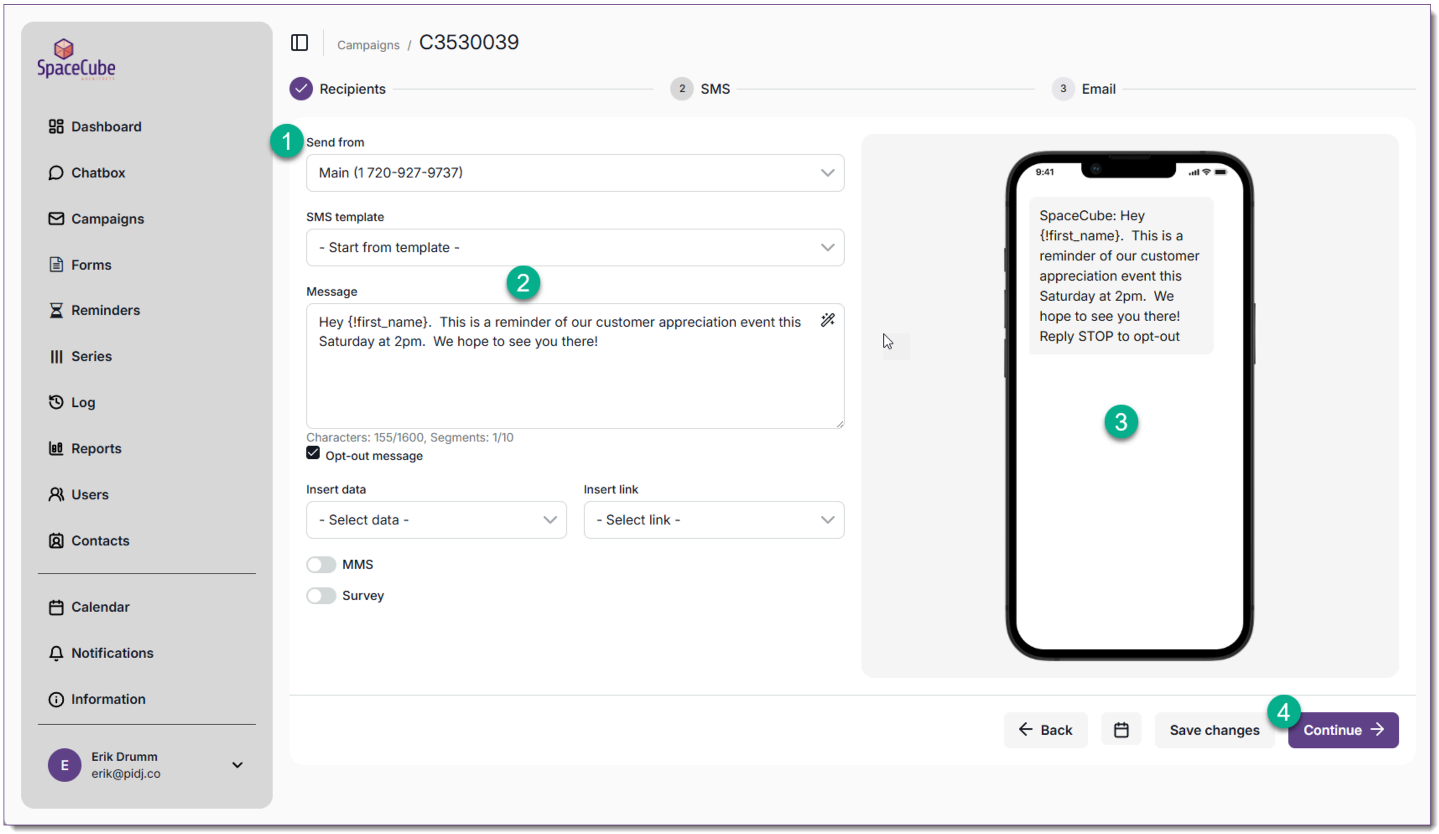
1. Click Create Campaign (top right).
2. Enter a Campaign Name.
3. Select your campaign type: SMS only, Email only, SMS + Email, or RCS.
4. Determine your audience criteria or simply add all contacts and click Apply criteria
5. Click Continue

*You can easily save a criteria template for use in future campaigns



Step 2: Create Your SMS Message

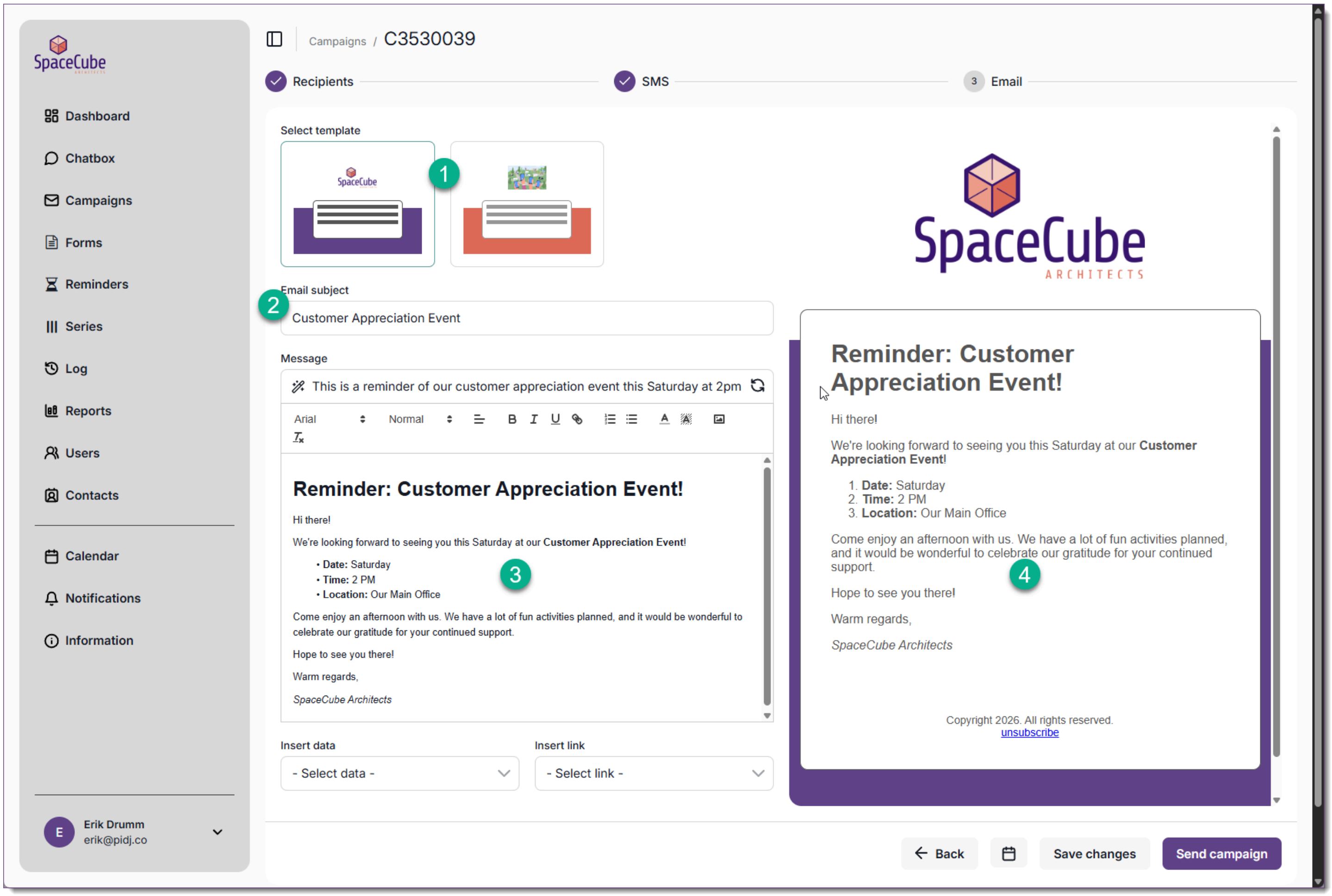
1. Choose the number you would like to send the message from
2. Write your message:
    a. From a message template (see templates)
    b. Using the the AI Message Coach
    c. Or simply type your own
3. Preview the SMS on the right
4. Click Continue



*You can personalize your message by inserting contact data, tracking links, pictures, and even vCards

Step 3: Create Your Email Message

1. Choose a saved email template
2. Enter the Subject of your email
3. Add email content or use the AI coach to help get started
4. Preview your email on the right



Step 4: Review & Send

- Save as draft/Save Changes → return later
- Schedule campaign → set a future date/time
- Send campaign → send immediately

Series

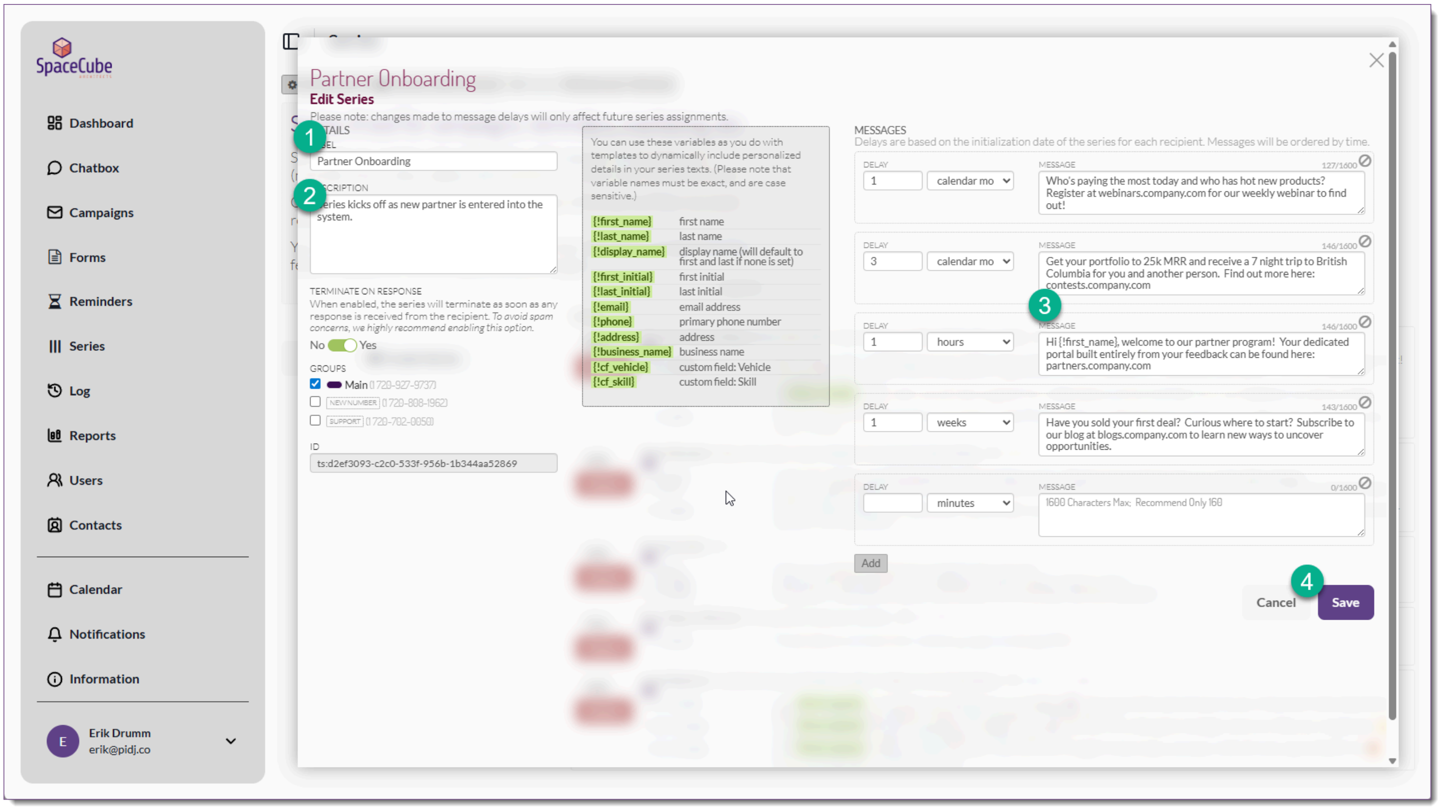
Series can be used to build informational campaigns, nurture leads, or provide an enhanced onboarding experience to your employees or customers.

First, you'll want to create a series which can be found under the Settings & Configuration menu in the lower left corner and select Create Series.

Creating a new Series:

1. Give it a name
2. Provide a brief description
3. Add your messages and respective delays
4. Click Save

*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.

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.

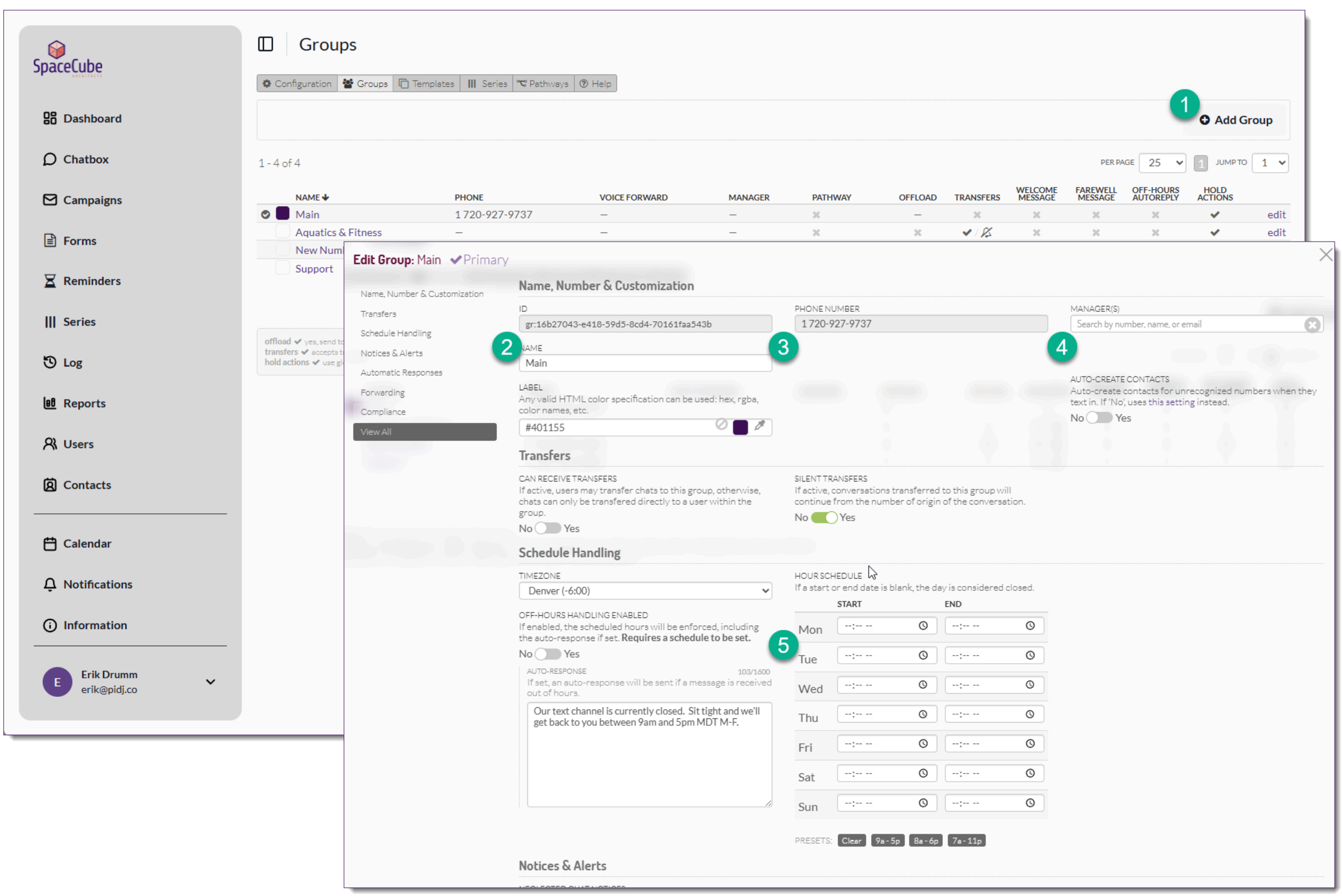
Groups

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 Settings & Configuration menu in the lower left.

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).

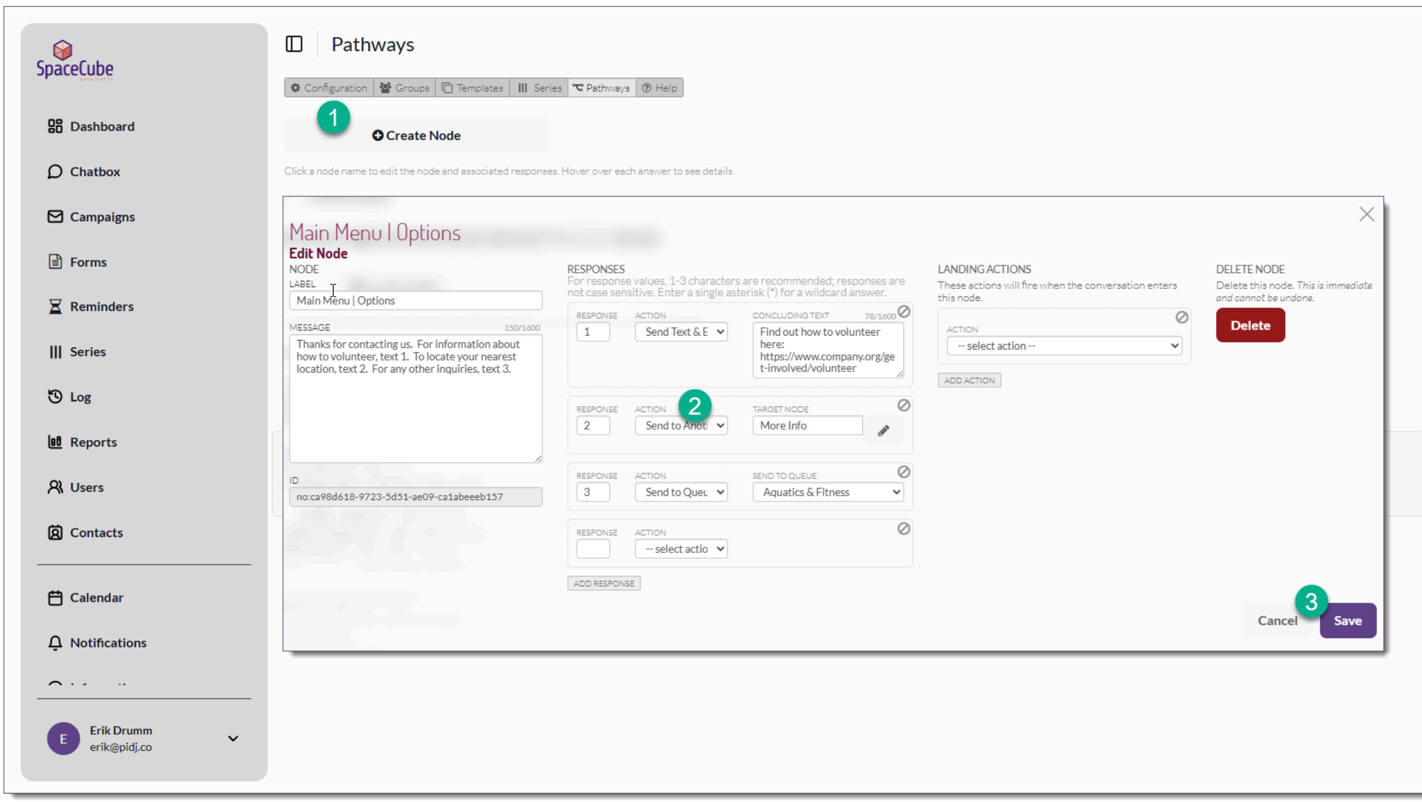
Pathways

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 Settings & Configuration menu in the lower left.

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 Settings & Configuration menu in the lower left.

Building Operations

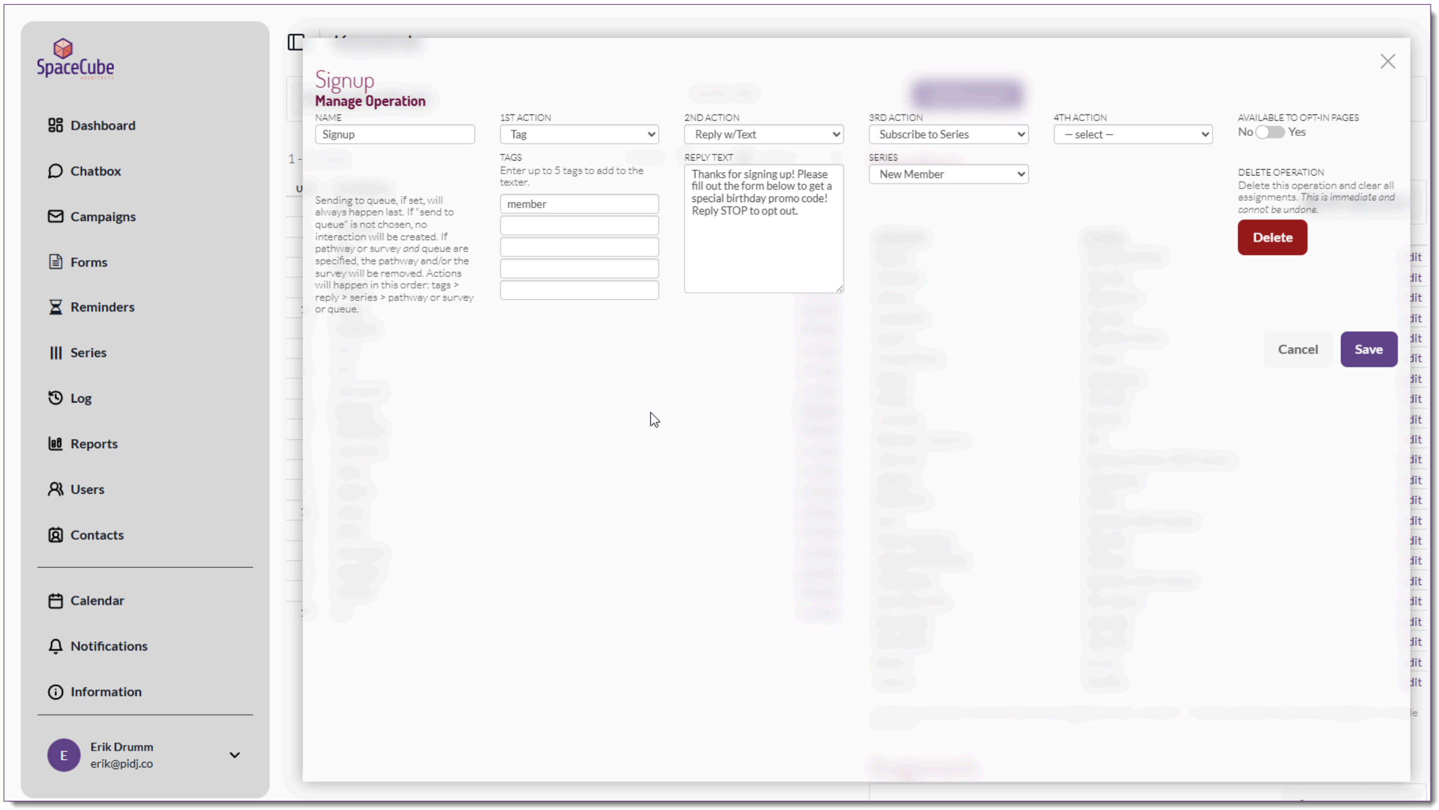
First, you will want to build an operation which is an action or multiple actions set to happen when a keyword is texted. These actions can be:

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.



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.

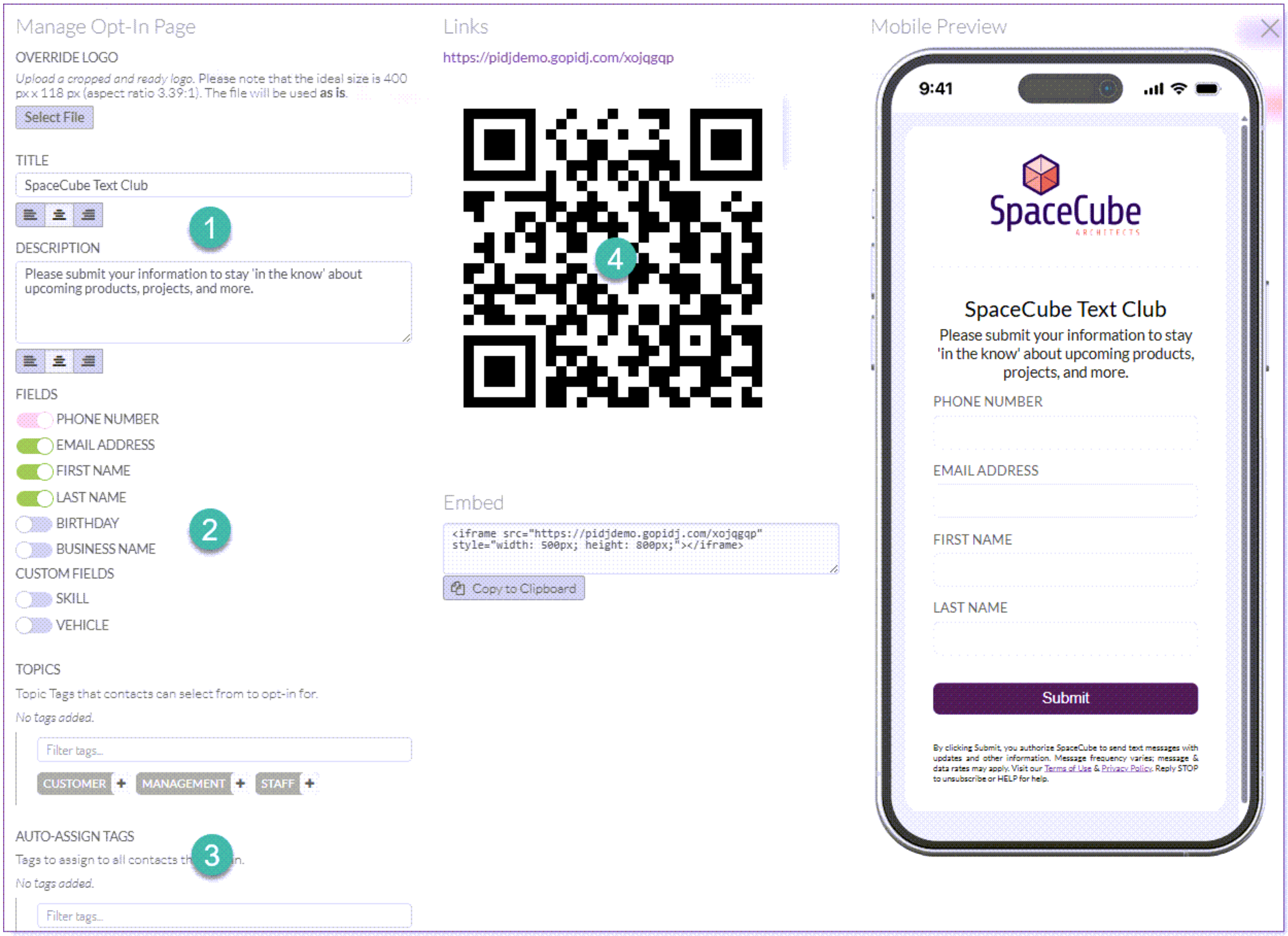
Keyword Assignment

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 Settings & Configuration menu in the lower left..



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). You can also determine which fields are required.
    - 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

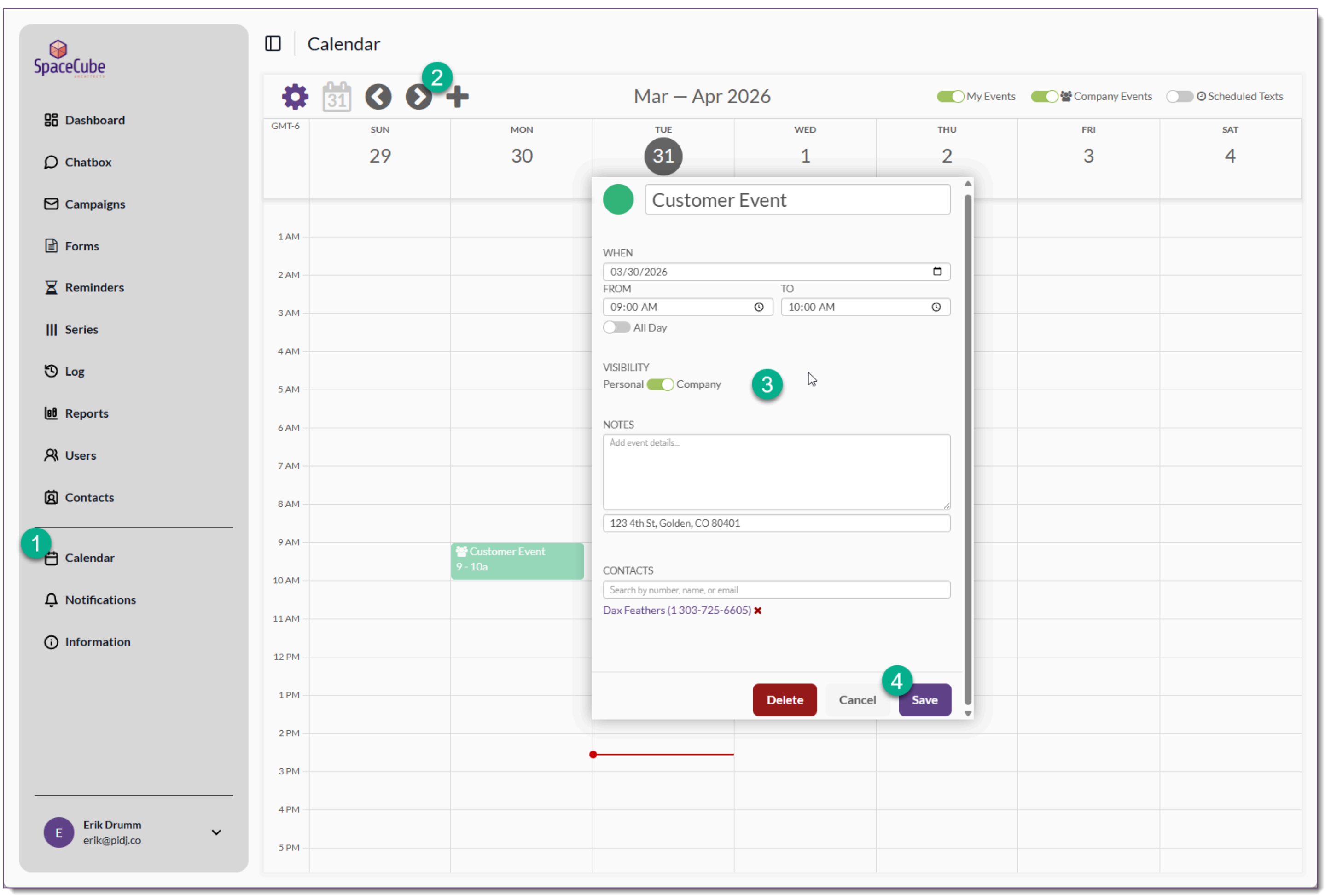
Once saved, use the provided URL or QR code to share your opt-in page. Alternatively, you can embed the page directly into your website using the provided iframe code.

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 events, meetings, and appointments and associate them with contacts using the Pidj calendar.



1. Select Calendar from the navigation menu on the left.
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.

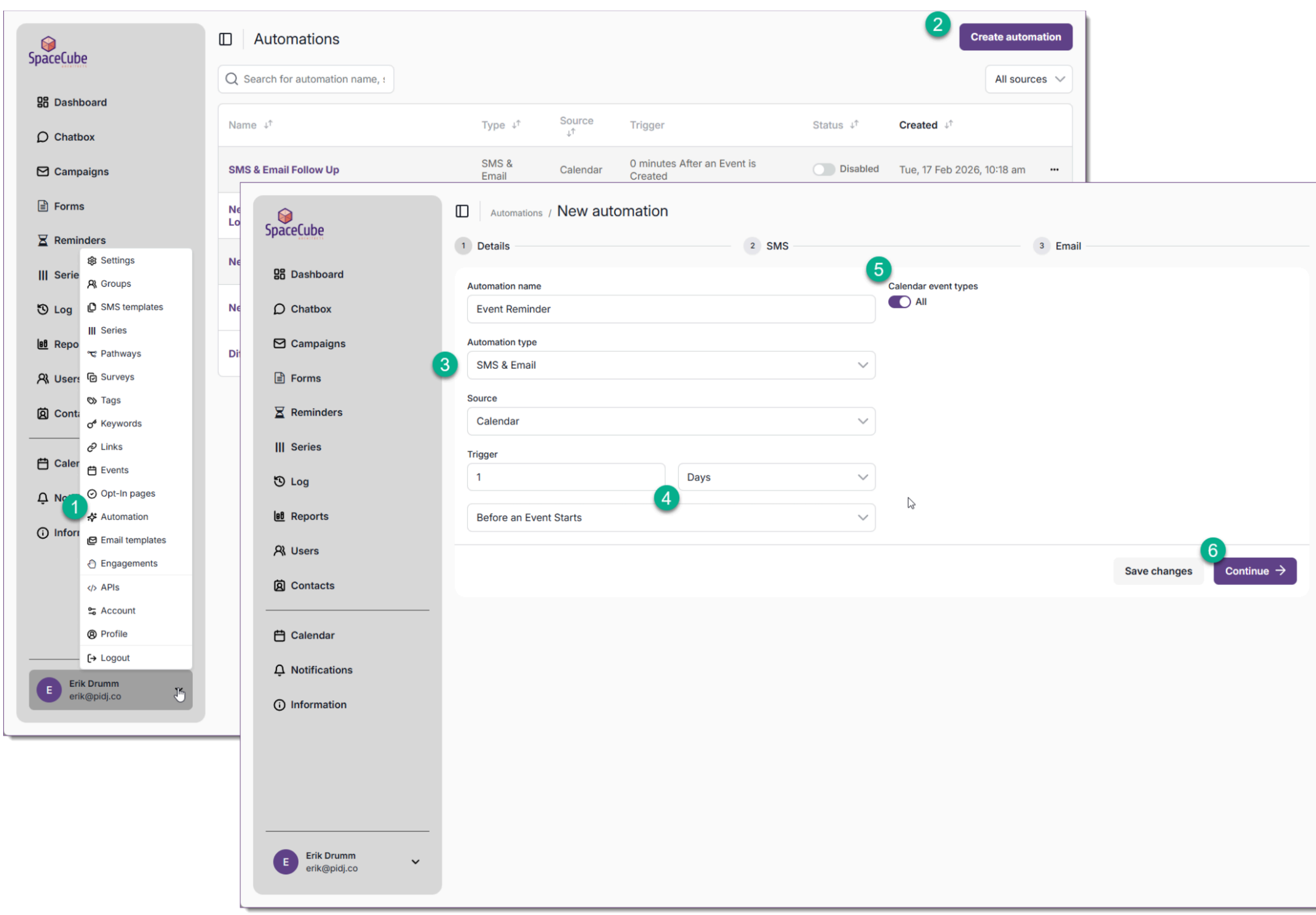
Customization

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.

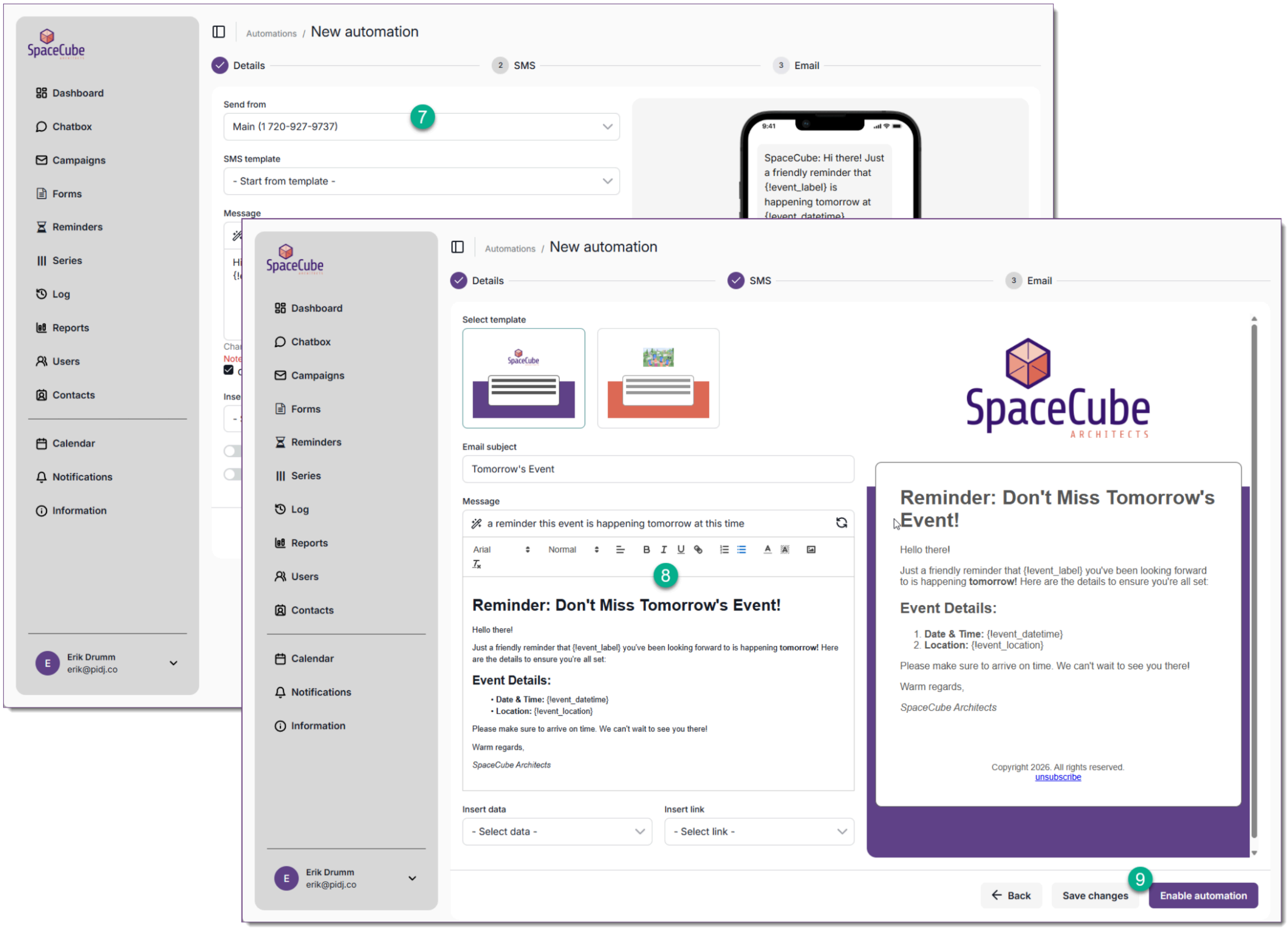
Automation

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

1. Navigate to **Automation** in the **Settings** menu in the lower left corner.
2. Click **Create Automation** in the upper right corner.
3. Name your automation, choose the notification type, and select **Calendar** as the source
4. Choose the time offset (such as 1 day before or 3 hours after)
5. Select the event type(s) you would like the automation to apply to
6. Click **Continue**.



7. Create your SMS message and insert event data as desired.
8. Create your email message and insert event data as desired.
9. Click Save changes to enable later or Enable automation to enable immediately.



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 Settings & Configuration menu in the lower left..

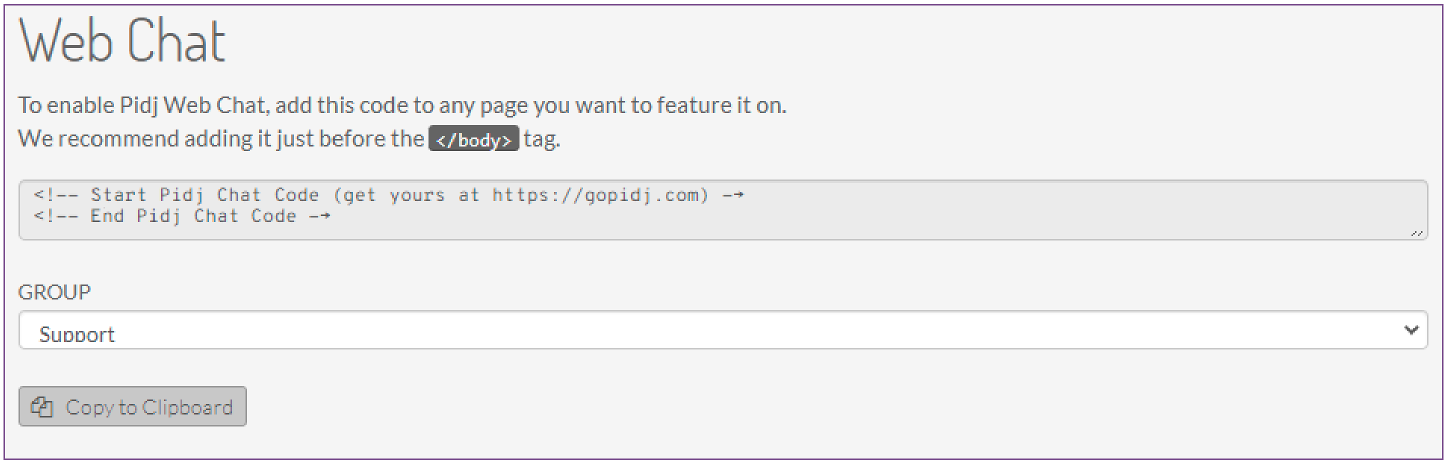
To create a new link, simply enter a name for your link, add the web address you would like the Pidj link to point to, and click Create. After a link has been generated, you can easily copy it for use anywhere, or select and add it when creating a new Campaign.

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.

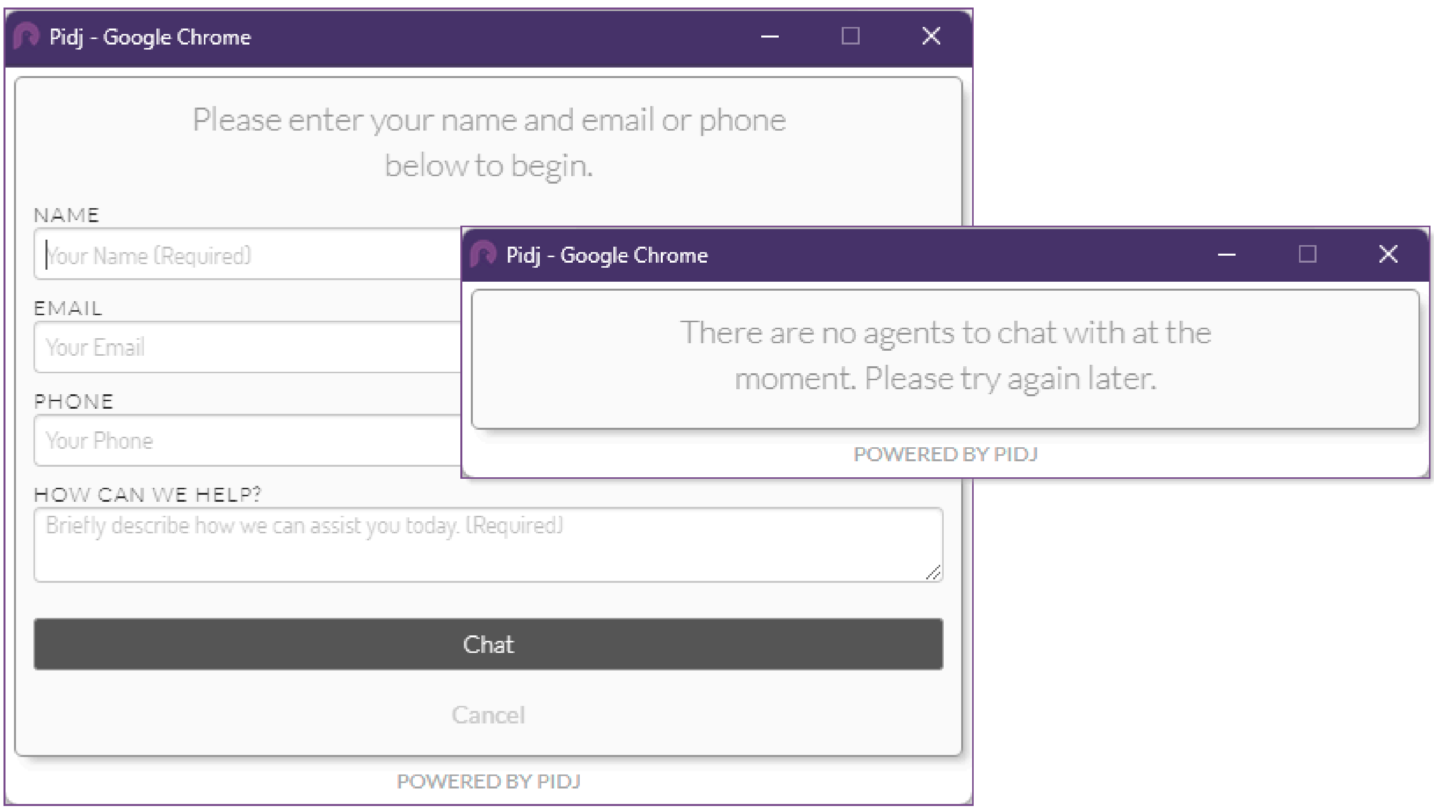
Adding the launcher

Web chat can be configured by clicking API under the Settings & Configuration menu in the lower left. 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.

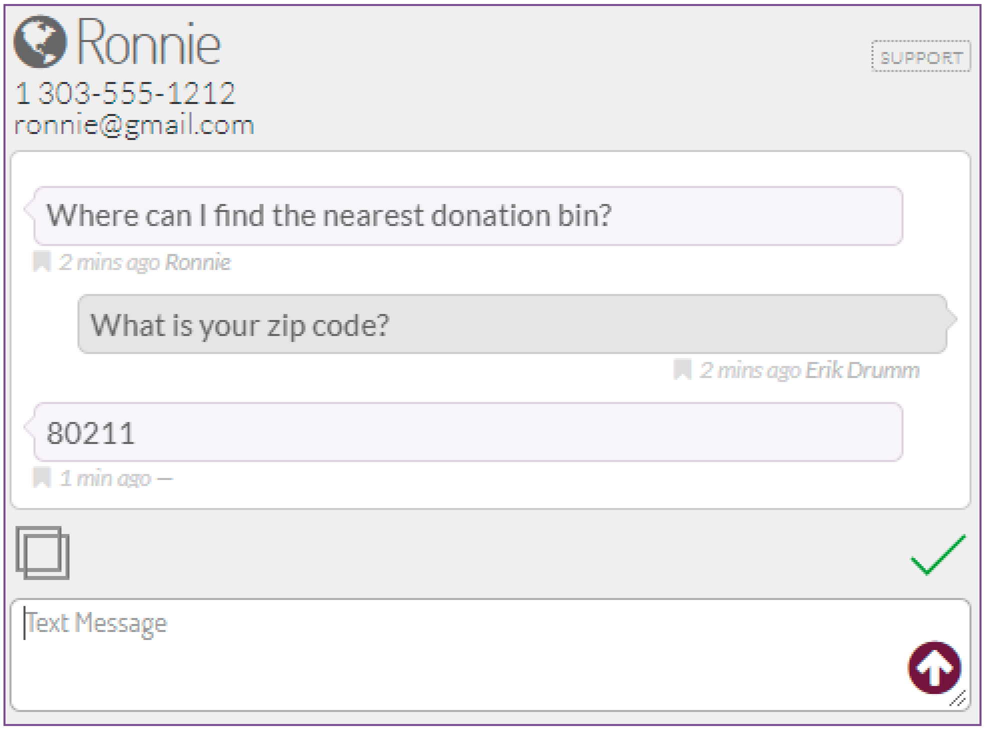


Web chat interactions

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 Settings & Configuration menu in the lower left and selecting **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 400px x 118px. This logo will become the default logo in opt-in pages and email templates.

Collapsed Logo: Upload a simple icon to with ideal square dimensions of 50px x 50px. This will show if the navigation menu is in collapsed mode.

Theme Color: By default this color will be your navigation menu color and most main button color.

Advanced Layout Settings: Choose alternate navigation menu logo as well as "dark" and "light" theme colors.

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).

Data Retention & Archiving

By default, Pidj retains message history for a rolling 12-month period.

For organizations that require longer-term access, Archiving can be enabled to securely store and access message history beyond 12 months.