



# 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

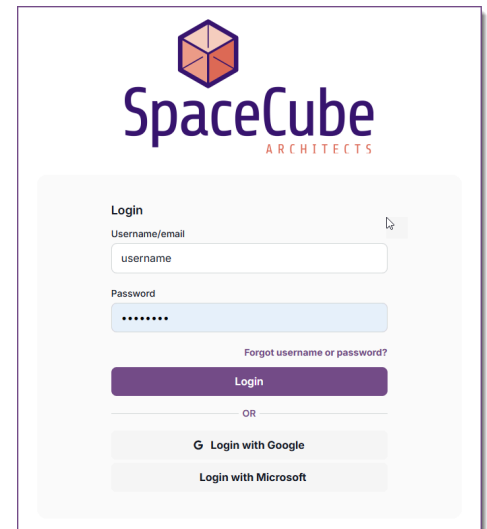
**Open API** - Text-enable existing software to enhance your workflows and simplify customer communication

**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.

The screenshot displays the 'New User' form in the Pidj application. The left sidebar shows the 'Users' menu item highlighted with a red circle '1'. The main content area shows the 'New User' form with various fields and options. A red circle '2' highlights the 'Add User' button in the top right corner. A red circle '3' highlights the 'First Name' field. A red circle '4' highlights the 'Save' button at the bottom right of the form. The form includes fields for Username, Password, Primary Phone, Email, First Name, Last Name, Display Name, External ID, Business Name, Phone, Fax, and Timezone. It also has sections for Notification Options (Email, Text, None), Max Chats for this User, Roles (Primary and Secondary), and Groups (Main, Aquatics & Fitness, New Number, Support).

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.

The screenshot displays the SpaceCube Contacts management interface. On the left is a navigation sidebar with options like Dashboard, Chatbox, Campaigns, Forms, Reminders, Series, Log, Reports, Users, Contacts, Calendar, and Notifications. The main area is titled 'Contacts' and includes a search bar, a table of existing contacts, and a 'New Contact' form. The table lists contacts with columns for Name, Business, Display, Group, Phone, Email, and Timezone. The 'New Contact' form is open, showing fields for External ID, Salutation, First Name, Last Name, Display Name/Nickname, Primary Phone, Email, Business Name, Timezone, Phone (Office), Fax, Home Street, Business Street, Postal, Preferred Agent, Default Group, Customer Type, Skill, and Vehicle. A 'Save' button is visible at the bottom right of the form.

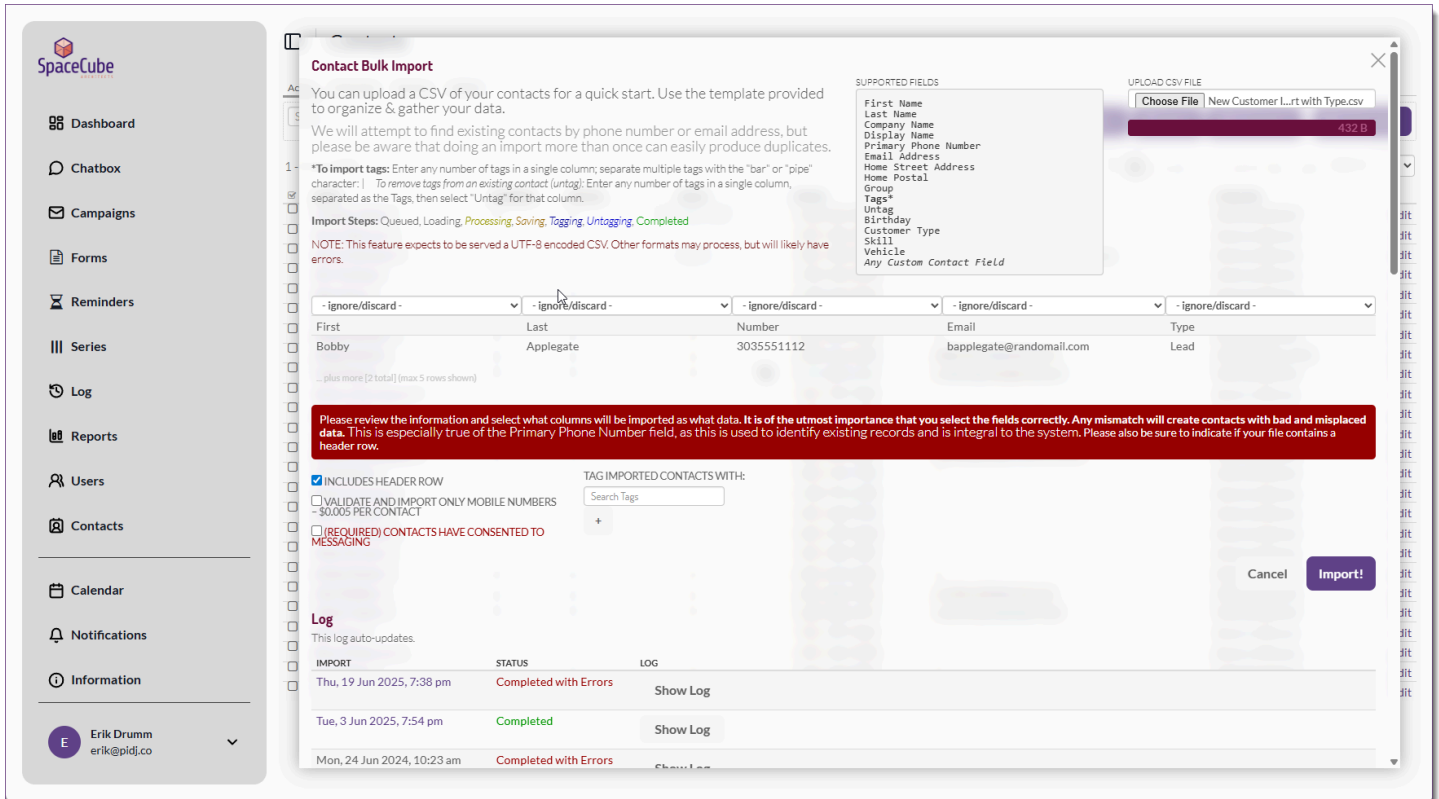
## Bulk importing contacts

To mass import your contacts:

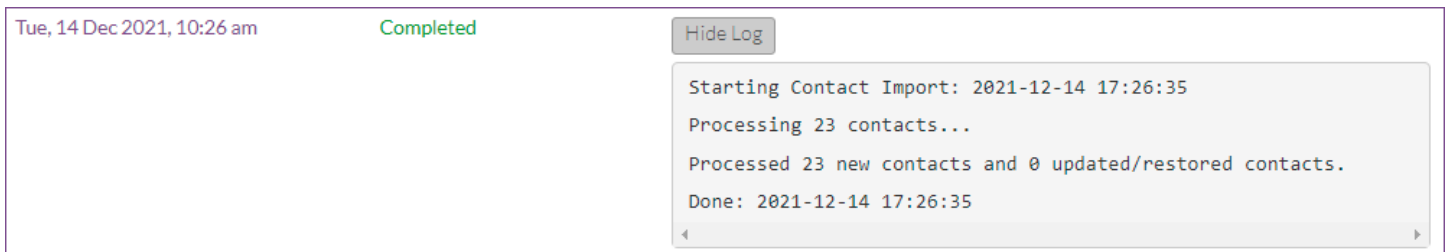
1. Export them from their current location and save the file as a .csv
2. From the Contacts screen, select Bulk Import
3. Choose the .csv file you have saved
4. Map the field names in your list to the field names in Pidj
5. Choose and/or create the tag(s) you would like to apply to the imported contacts

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)

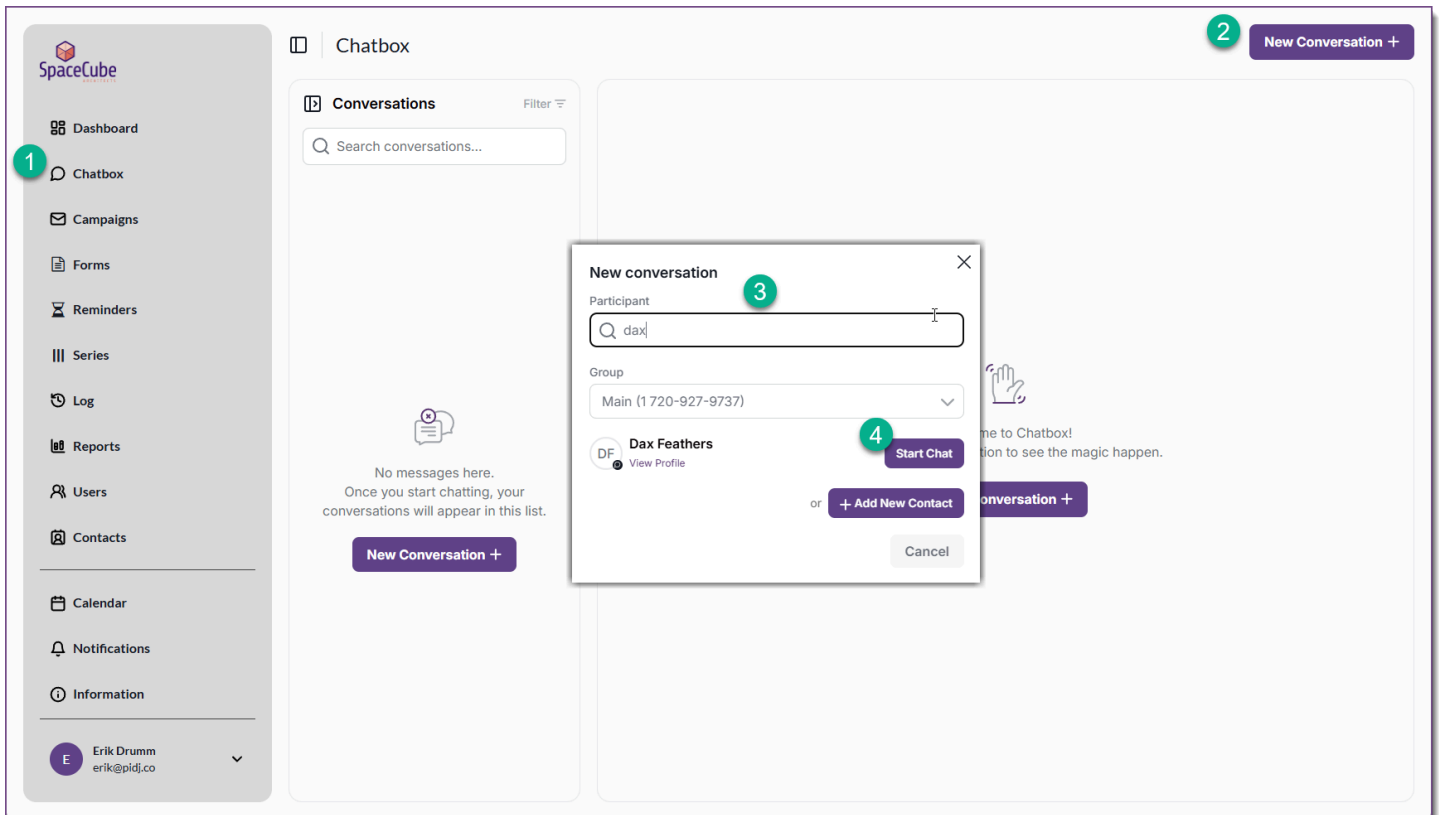
# Sending Messages

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 Conversation +**
3. Search for an existing contact or **Add New Contact**
4. Click **Start Chat**



# Campaigns - Many Contacts

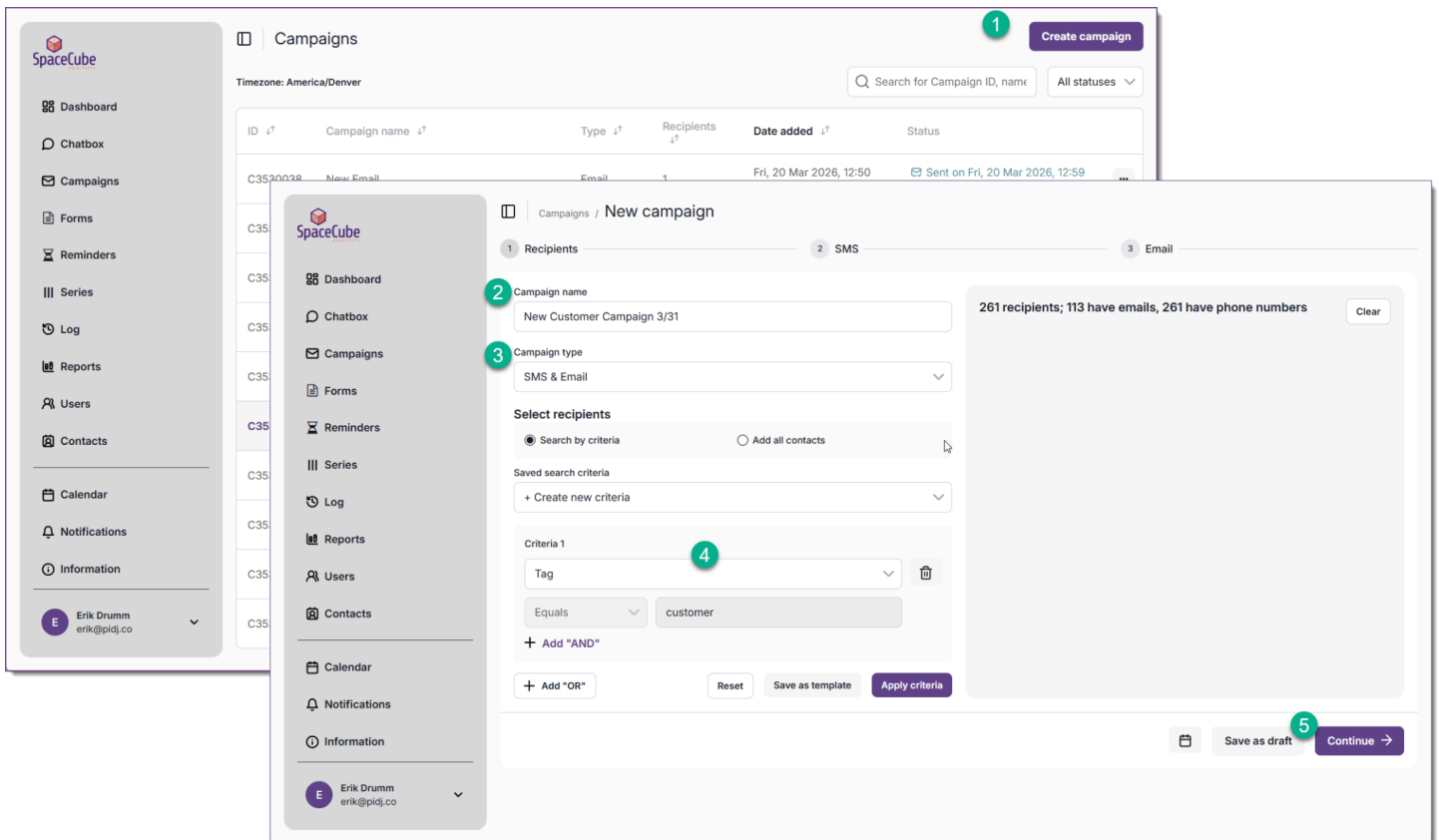
Campaigns make it easy to reach your audience by SMS, email, or both as well as RCS – all in one workflow.

To send a Campaign:

## Step 1: Start a New Campaign

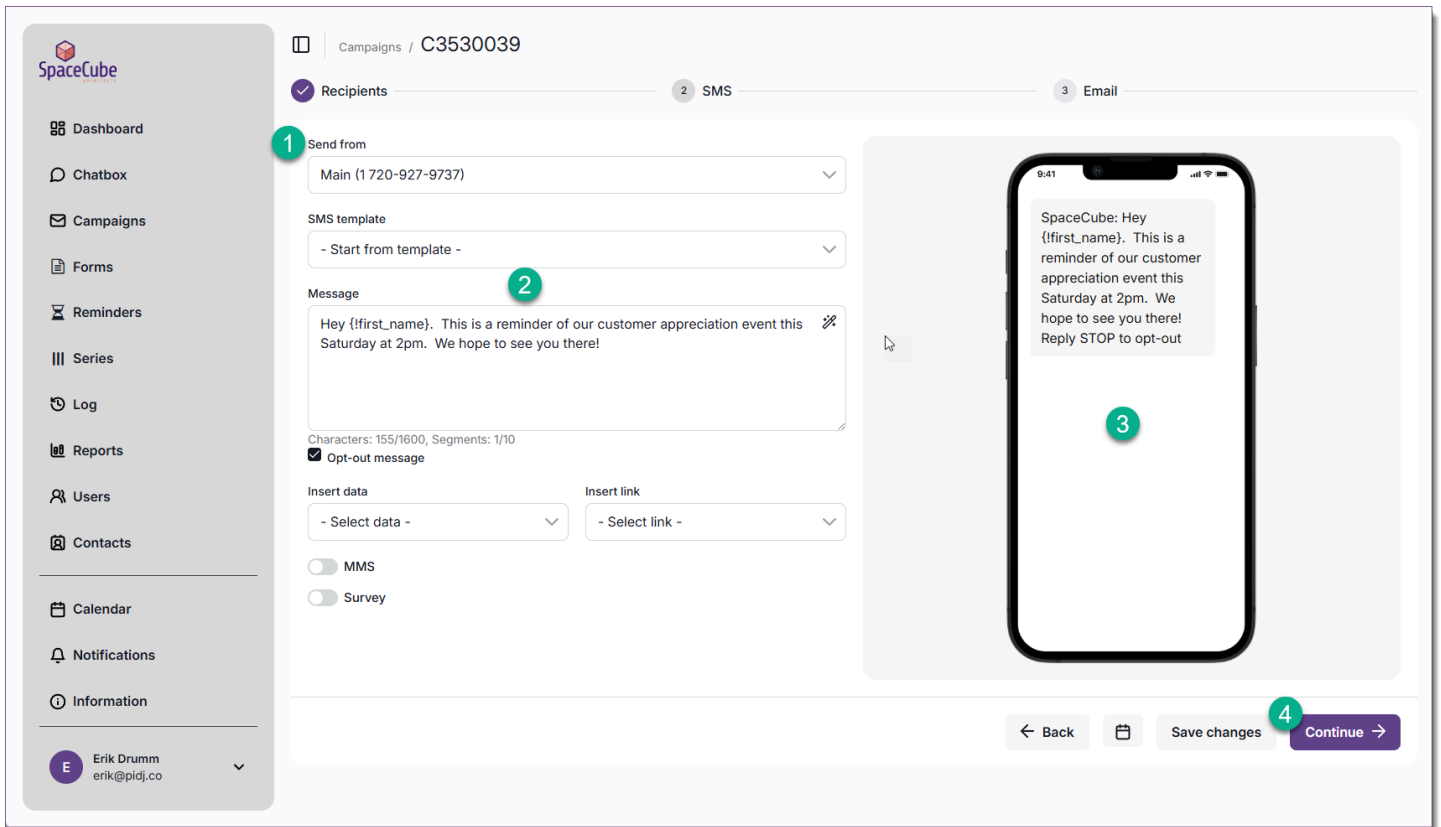
1. Click Create Campaign (top right).
2. Enter a Campaign Name.
3. Select your campaign type: SMS only, Email only, SMS + Email, or RCS.
4. Determine your audience criteria or simply add all contacts and click Apply criteria
5. Click Continue

\*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

The screenshot displays the SpaceCube campaign editor. On the left is a sidebar with navigation items: Dashboard, Chatbox, Campaigns, Forms, Reminders, Series, Log, Reports, Users, Contacts, Calendar, Notifications, and Information. The user profile at the bottom left is Erik Drumm (erik@pidj.co). The main workspace shows a campaign for 'C3530039' with 'Recipients' and 'SMS' selected. The 'Email' step is active, showing a 'Select template' section with two options, one of which is selected (marked with a '1'). Below is the 'Email subject' field containing 'Customer Appreciation Event' (marked with a '2'). The 'Message' section includes a subject line, a rich text editor with a toolbar, and a preview of the email content (marked with a '3'). The preview shows a reminder for a 'Customer Appreciation Event' on Saturday at 2 PM in the Main Office. A final preview on the right (marked with a '4') shows the rendered email with the SpaceCube logo, a title, a greeting, event details, a closing, and a footer with a copyright notice and an unsubscribe link. At the bottom right, there are buttons for 'Back', 'Save changes', and 'Send campaign'.

## 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.

The screenshot displays the 'Partner Onboarding' series configuration in SpaceCube. The interface is divided into a left-hand navigation menu and a main configuration area. The main area includes a title 'Partner Onboarding Edit Series', a description, a 'TERMINATE ON RESPONSE' section, a 'GROUPS' section, and a 'MESSAGES' section. The 'MESSAGES' section lists several messages with their respective delays and content. A red circle highlights the 'Save' button at the bottom right of the configuration area.

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

The screenshot shows the Pidj Groups management interface. The sidebar on the left contains navigation options: Dashboard, Chatbox, Campaigns, Forms, Reminders, Series, Log, Reports, Users, Contacts, Calendar, Notifications, and Information. The main content area displays a table of groups with columns for Name, Phone, Voice Forward, Manager, Pathway, Offload, Transfers, Welcome Message, Farewell Message, Off-Hours Autoreply, and Hold Actions. A modal window titled "Edit Group: Main" is open, showing configuration options for Name, Number & Customization, Transfers, Schedule Handling, and Notices & Alerts. Red circles 1 through 5 highlight key actions: 1. Add Group button, 2. Name field, 3. Phone Number field, 4. Manager field, and 5. Save button.

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

The screenshot displays the Pidj Pathways interface. On the left is a sidebar with navigation options: Dashboard, Chatbox, Campaigns, Forms, Reminders, Series, Log, Reports, Users, Contacts, Calendar, and Notifications. The user profile at the bottom of the sidebar is Erik Drumm (erik@pidj.co). The main content area is titled 'Pathways' and includes a 'Create Node' button (marked with a green '1'). Below this is a modal window titled 'Main Menu | Options' with the subtitle 'Edit Node'. The modal contains the following fields and sections:

- NODE LABEL:** 'Main Menu | Options'
- MESSAGE:** 'Thanks for contacting us. For information about how to volunteer, text 1. To locate your nearest location, text 2. For any other inquiries, text 3.'
- RESPONSES:** A table with columns for RESPONSE, ACTION, and CONCLUDING TEXT.
  - Response 1: '1', Action: 'Send Text & E', Concluding Text: 'Find out how to volunteer here: https://www.company.org/get-involved/volunteer'
  - Response 2: '2', Action: 'Send to Agent', Target Node: 'More Info'
  - Response 3: '3', Action: 'Send to Queue', Send to Queue: 'Aquatics & Fitness'
- LANDING ACTIONS:** A dropdown menu with the option '-- select action --'.
- DELETE NODE:** A red 'Delete' button with the warning: 'Delete this node. This is immediate and cannot be undone.'
- Bottom Right:** 'Cancel' and 'Save' buttons (the 'Save' button is marked with a green '3').

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

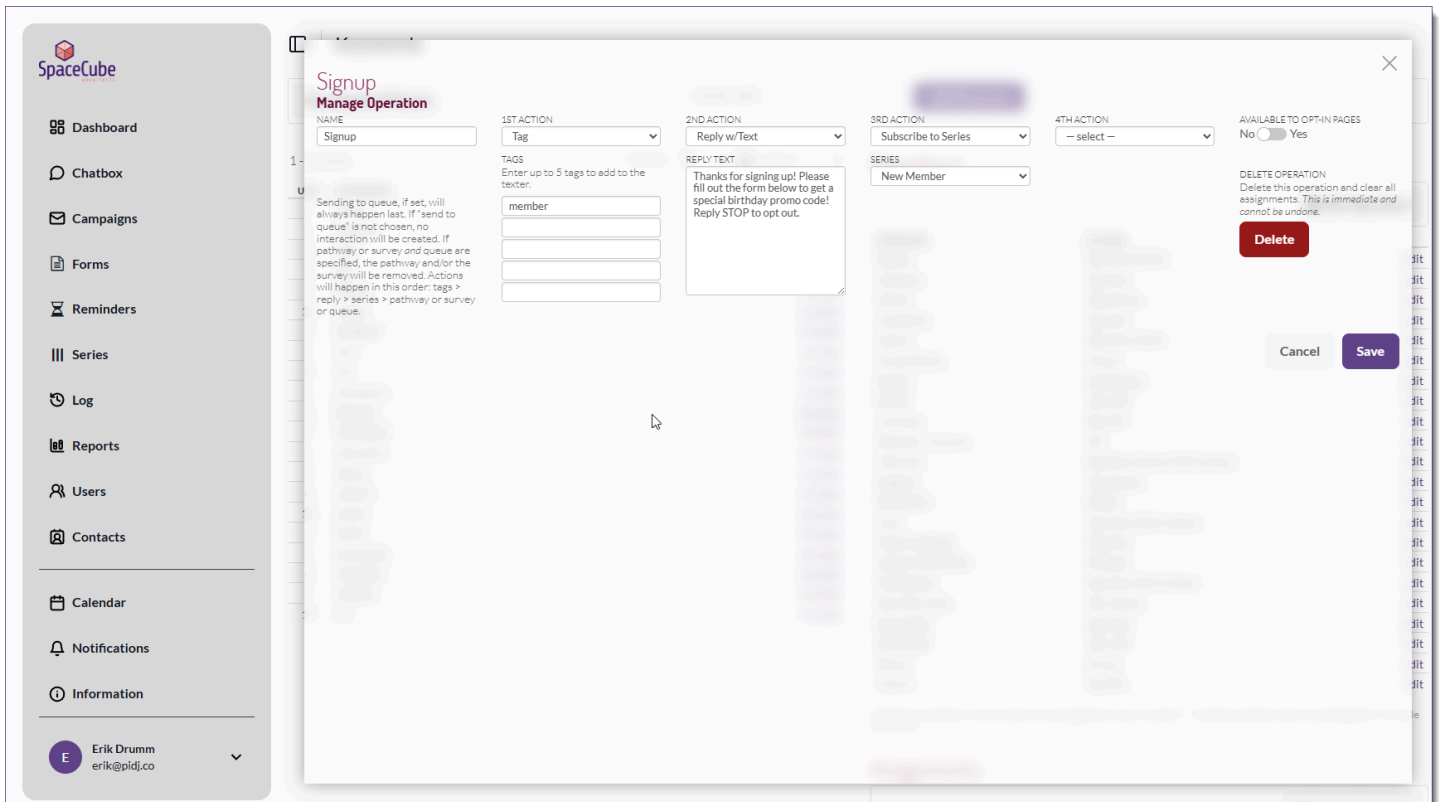
Send contact edit link - sends a web-link for a [page](#) that allows contacts to add/update their information

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..

The screenshot displays the 'Manage Opt-In Page' interface. On the left, there are sections for 'OVERVERRIDE LOGO', 'TITLE' (with a '1' callout), 'DESCRIPTION', 'FIELDS' (with a '2' callout), and 'TOPICS'. The 'FIELDS' section includes checkboxes for PHONE NUMBER, EMAIL ADDRESS, FIRST NAME, LAST NAME, BIRTHDAY, BUSINESS NAME, SKILL, and VEHICLE. Below this is the 'AUTO-ASSIGN TAGS' section (with a '3' callout). In the center, the 'Links' section shows a URL and a QR code (with a '4' callout). Below the QR code is an 'Embed' section with an iframe code and a 'Copy to Clipboard' button. On the right, the 'Mobile Preview' shows a smartphone displaying the opt-in page with the SpaceCube logo, title, description, and 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). 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.

The screenshot displays the Pidj calendar interface. On the left is a navigation sidebar with the SpaceCube logo and menu items: Dashboard, Chatbox, Campaigns, Forms, Reminders, Series, Log, Reports, Users, and Contacts. The 'Calendar' item is highlighted with a green circle '1'. The main area shows a calendar for March and April 2026. A 'Customer Event' is scheduled for 9-10a on March 30th. A modal form for editing the event is open, with a green circle '2' on the '+' button and a green circle '3' on the 'Company' visibility toggle. The modal includes fields for 'WHEN' (date and time), 'VISIBILITY' (Personal/Company), 'NOTES' (with address '123 4th St, Golden, CO 80401'), and 'CONTACTS' (with 'Dax Feathers (1.303-725-6605)' selected). A green circle '4' is on the 'Save' button. At the bottom of the sidebar, the user profile for Erik Drumm (erik@pidj.co) is visible.

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.

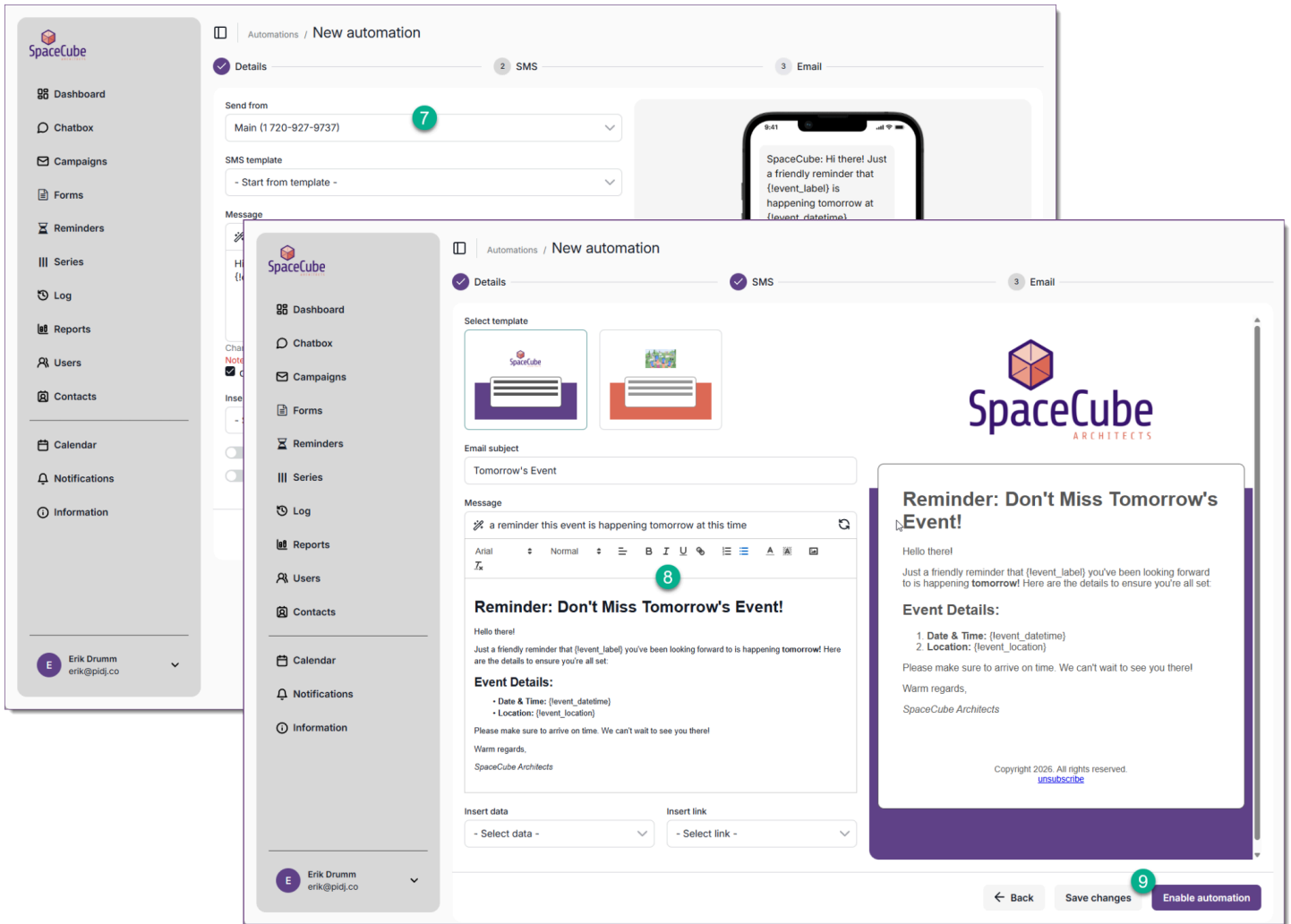
## Automation

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**.

The screenshot displays the SpaceCube Automations interface. On the left is a navigation sidebar with categories like Dashboard, Chatbox, Campaigns, Forms, Reminders, Series, Log, Reports, Users, Contacts, Calendar, Notifications, and Information. The 'Automation' option is highlighted with a green circle '1'. The main content area shows the 'Automations' page with a 'Create automation' button circled in green '2'. Below this is a table of existing automations. A modal window titled 'New automation' is open, showing a multi-step form. Step 1 'Details' includes fields for 'Automation name' (Event Reminder), 'Automation type' (SMS & Email), and 'Source' (Calendar). Step 2 'SMS' includes a 'Trigger' field set to '1' and a 'Days' dropdown. Step 3 'Email' includes a 'Calendar event types' toggle set to 'All'. A 'Continue' button is circled in green '6' at the bottom right of the modal.

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

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

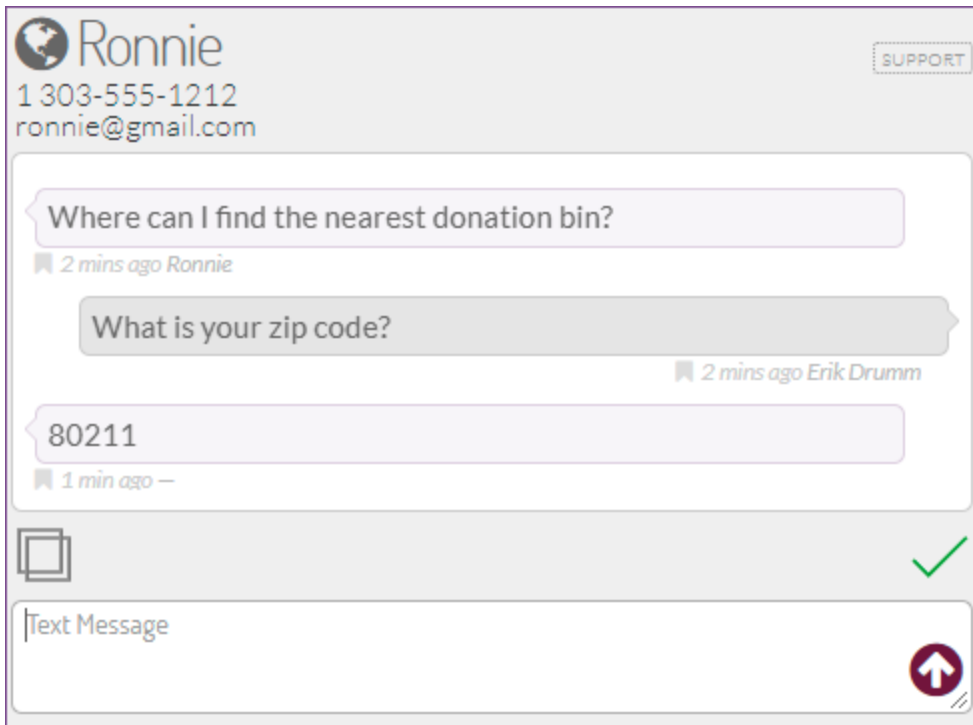
Web chat interactions are initiated by clicking the icon which is placed by default in the lower right portion of a web page. Users are required to enter basic information prior to starting the chat.

The screenshot shows a web browser window titled "Pidj - Google Chrome". The main content area displays a chat initiation form with the following elements:

- Header: "Please enter your name and email or phone below to begin."
- Form fields: "NAME" (with placeholder "Your Name (Required)"), "EMAIL" (with placeholder "Your Email"), "PHONE" (with placeholder "Your Phone"), and "HOW CAN WE HELP?" (with placeholder "Briefly describe how we can assist you today. (Required)").
- Buttons: "Chat" and "Cancel".
- Footer: "POWERED BY PIDJ".

An overlaid dialog box, also titled "Pidj - Google Chrome", contains the message: "There are no agents to chat with at the moment. Please try again later." and "POWERED BY PIDJ" at the bottom.

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.