

# Velocify LeadManager™

## 18.2 LeadManager Administration Guide (SMS)

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## Advanced SMS Text Messaging

The new advanced SMS text messaging feature in 18.2 LeadManager provides the following features for LeadManager users:

- **Automated SMS:**
  - Bulk texting (new: short code/opt-in; available for an additional charge)
  - Individual texting (long code/triggered texts)
- **New: SMS Messenger Window**
  - Delivers direct rep to lead text messaging and more instant access for prospect to communicate with rep, by keeping the workflow within their main screen
  - Seamlessly integrated click-to-text window pops up within LeadManager Priority View. Personalized by sales rep, not spam texting.
  - SMS Activity Logging/Reporting
  - Mobile Number Validation
  - Included with LeadManager Advanced, usage fees apply

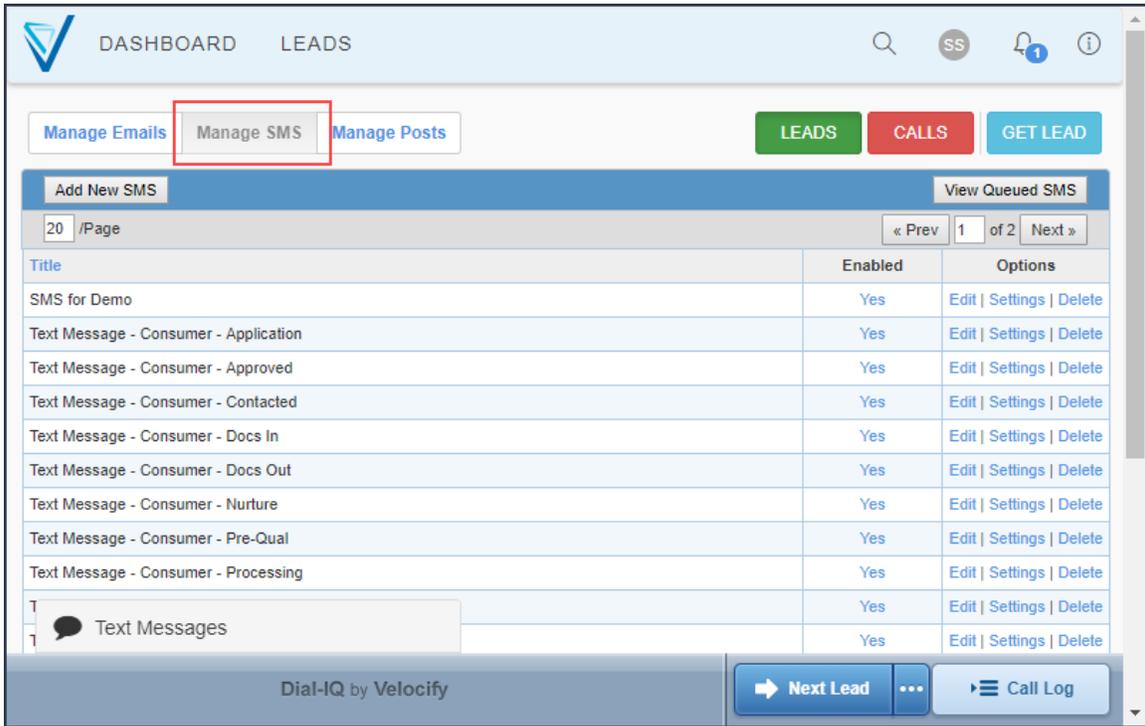
In addition to these new features, the following Administration settings are also being introduced in LeadManager 18.2:

### New Manage SMS Templates Page

A new menu option has been added: Menu → Administration → Communications → Manage SMS. This page lists the SMS templates. Its look and feel is similar to the Manage Posts page and it features an [Add New Message] at the top left of the page.

To Manage SMS Templates:

1. Click your name in the header at the top of the screen to access the links to each page in LeadManager.
2. In the Administration group, click **Communication**.
3. Click the **Manage SMS** button to view the template list.



- To edit a template, click the **Edit** link for the template.

### Add/Edit SMS Template Page

The 'Add/Edit SMS Message' form is shown. It includes the following fields and elements:

- Tabs: **Compose SMS** (active), Delivery/Drip Settings
- Title: Text Message - Consumer - Approved
- To: Primary Contact Phone Numbers
- SMS Message body: It's {User.Name.First} from {Company.Name}. Your Loan is Approved! Txt STOP to quit.
- Characters: 85
- Buttons: Apply, Submit, Cancel

- On the Compose SMS tab:
  - In the Title field, type the title or subject of the message.
  - The Primary Contact phone numbers are the default selection and can be configured on the SMS Settings page under Client Settings.
    - If you want to send the template to someone other than the lead, open the “To” drop-down menu and select the phone to send it to. If you select a number other than the Primary Contact phone numbers, Velocify will not conduct a lookup process for that phone number and conversations with that number will not be included in the Text Message window.
  - In the SMS Message section, type the message you want to send.
  - Click **Apply** to apply the content to the template.
  - Click **Submit** to submit the template and return to the Manage SMS screen.
  - Click **Cancel** to cancel any changes you have made and return to the Manage SMS screen.

- On the Delivery/Drip Settings tab, a new Status Trigger is now provided. Here you can select either an action or status trigger for this template.

The screenshot shows the 'Delivery/Drip Settings' tab for a 'Text Message - Consumer - Approved' template. The 'Status Trigger' section has a 'Select:' dropdown set to 'Action' and a 'to trigger:' dropdown menu that is open, showing a list of status triggers including 'Application Taken', 'Application Withdrawn', 'Approved', 'Bad Lead: Return to Vendor', 'Bad Phone Number', 'Borrower Rescinded', 'Called: Abandoned Call', 'Called: Contacted/Call Back', 'Called: Left Message', 'Called: No Contact', 'Change to Nurture', 'Dead', 'Docs Received', 'Does Not Qualify', 'Funded Loan', 'General Comment', 'Get Zillow URL', 'Inbound Email', and 'Not Approved'. The 'Delayed Sending (Drip Marketing)' section has three radio button options: 'Send immediately: The SMS will be sent immediately.', 'Send after a trigger occurs: The SMS will be sent after a specified number of minutes after the trigger occurs.', and 'Send before or after a specific time: The SMS will be sent before or after a specific time of day.' The 'Cancel Upon Status Change' checkbox is checked. There is also a 'Send Conditions Note' and a 'Column' dropdown menu.

(This new setting is also available on the Manage Posts and Manage Emails page.)

### New Roles and Permission: Manage SMS Template

On the Manage Roles & Permissions page in each column (Read, Add, Edit, Delete), the drop-down menus only have the Enabled/Disabled options. When enabled, the permissions work as follows:

- **Read:** User can access the new Manage SMS Messages page and can view each of the children pages, but cannot edit.
- **Add:** User can access the new Manage SMS Messages page, can view each of the children pages, and can add a new template.
- **Edit:** User can access the new Manage SMS Messages page, can view of each of the children pages, can edit an existing template, but cannot add a new template
- **Delete:** Can access the new Manage SMS Messages page, can't access the children pages, can't add new templates, can delete existing templates.

The default setting for these by role are:

- Administrator: Enabled (all)
- Power User: Disabled (all)
- User: Disabled (all)

This permission controls access to the Manage SMS Template pages which are accessible through [Your Name] → Administration → Communications → Manage SMS. If a role does not have Read permission, this menu item would be hidden.

### New Roles and Permission: SMS Messenger

On the Manage Roles & Permissions page in each column (Read, Add, Edit, Delete), the drop-down menus only have the Enabled/Disabled options. When enabled, the user can access the SMS messenger window and can compose a new message to or respond to a message from a lead.

The default setting for these by role are:

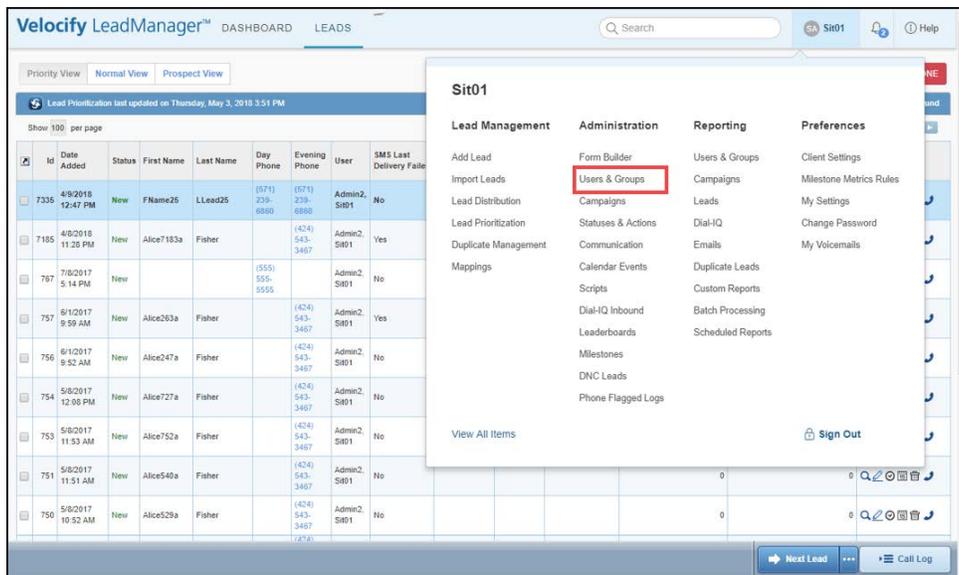
- Administrator: Enabled (all)
- Power User: Enabled (all)
- User: Enabled (all)

### Disable SMS Messenger

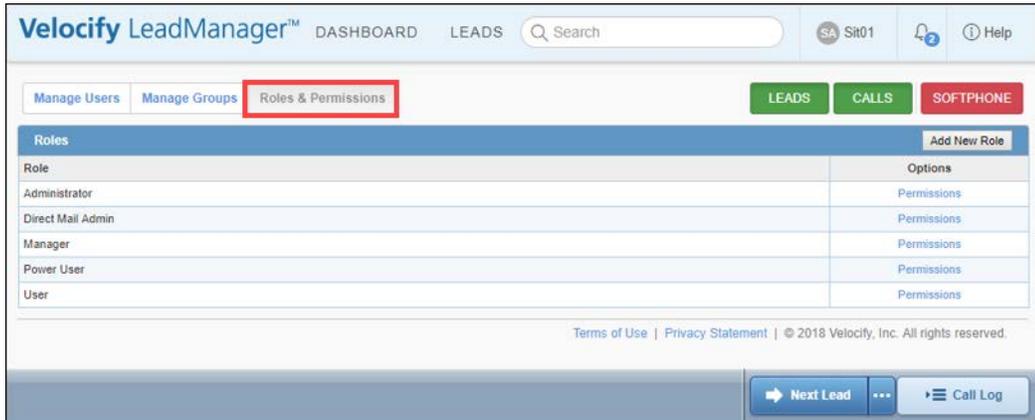
LeadManager administrators have the ability to disable the SMS messaging window using Roles and Permissions settings.

To Disable SMS Messenger:

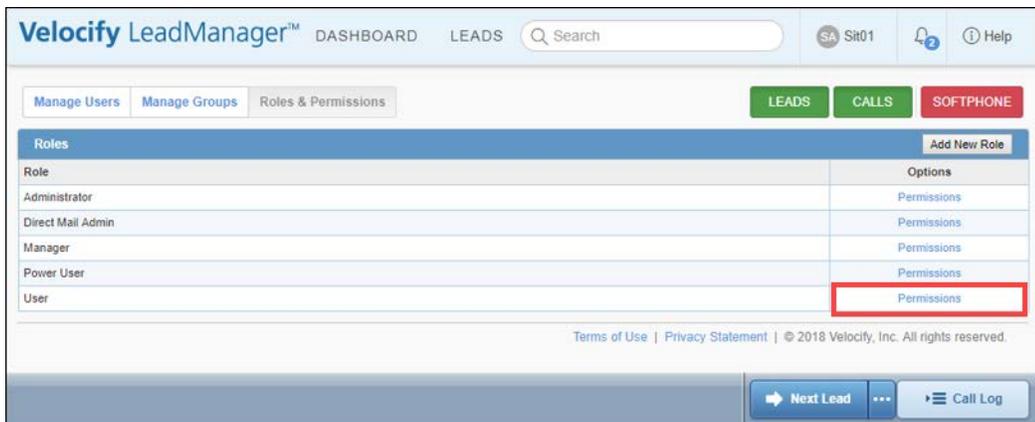
1. From the Administration menu, select **Users & Groups**.



2. Click the **Roles & Permissions** tab.



3. Click the **Permissions** link corresponding to the Role for which you want to disable the SMS messaging window.



4. In the *SMS Messenger* row, select **Disabled** from the drop-down list.



5. Click the **Submit** button.

The screenshot shows a settings form with several rows. The first row is 'Marketing Programs' with 'Enabled: All' and 'Can see all Marketing Programs' set to 'Disabled'. The second row is 'SMS Messenger' set to 'Disabled'. The third row is 'Manage SMS Template' with 'Disabled' for both fields. At the bottom right of the form, the 'Submit' button is highlighted with a red rectangular box. Below the form, there is a 'Text Messages' input field, a footer with 'Dial-IQ by Velocity', and navigation buttons for 'Next Lead' and 'Call Log'.

### SMS Settings Center

A new SMS Settings tab has been added to the Client Settings page to house the new SMS settings.

To Manage SMS Settings:

1. Click your name in the header at the top-right of the screen.
2. In the Preferences group, click **Client Settings**.
3. Click the **SMS Settings** tab.

The screenshot shows the 'SMS Settings' page. At the top, there are tabs for 'Settings: Client', 'Lead View: Columns', 'Lead View: Statuses', 'Pull Distribution: Columns', 'Direct Mail: Search Results Columns', 'Direct Mail: Searchable Fields', 'Call Settings: Client', and 'SMS Settings'. The 'SMS Settings' tab is active. The page is divided into sections: 'Account Settings' with 'Company SMS Numbers' (+14242197415) and 'User Messaging Options' (radio buttons for 'Always Allow User Messaging', 'Don't Allow User Messaging Until 1st SMS Template Sends to Lead', and 'Don't Allow User Messaging Until Lead reaches Contacted Milestone'); 'Primary Contact Phone Numbers' (three dropdown menus for 'Day Phone', 'Mobile Phone', and an optional one); 'SMS Lead Identifier' (dropdown menu set to 'Status'); 'Timezone Protect' (fields for 'Do Not Text Leads Before' and 'Do Not Text Leads After', and a checkbox for 'Allow users to override SMS Timezone Protect'); and 'Calendar Event SMS Reminder to Lead' (a text area for 'Reminder Message' with a 'View Field Tags' link). At the bottom right, there are 'Apply', 'Submit', and 'Cancel' buttons.

The settings on this tab are as follows:

- **Company SMS Numbers:** This shows the provisioned long code number(s) you have in your database. This field is read-only and for reference only.
- **User Messaging Options:** This section provides different messaging options to help prevent users from being able to send SMS messages to leads through the messenger window until a certain milestone is met. This includes contextual help. The messaging options are:
  - Always allow
  - Don't allow until 1st template sends
  - Don't allow until lead reaches the contacted milestone
- **Primary Contact Phone Numbers** - This setting features three drop-down fields populated by the fields that are phone type on Form Builder. The numbers selected here are what will be used for the automatic SMS phone lookup process for every lead when a text message is sent. They are marked as 1, 2, 3. The default selections are the same fields that the client is using in their SMS templates. Clients who do not yet have SMS configured will have no default selected. The drop-down menu with a blank entry displays "-- Select Phone --"
- **SMS Lead Identifier:** This shows the field Velocity will display as additional lead context in the messenger window. The drop-down menu includes all lead fields that are Phone, Text, Number, Money, Drop-down, and Email type. It will also include Campaign, Lead Type, Status, and ID. ID is the default. This includes contextual help.
- **SMS Timezone Protect:** Velocity now provides timezone protect for SMS. You can set your "allowed" times when users can text leads and when template SMS messages can send. If a template SMS triggers outside of that time, it will queue and send only when it comes within that range again. If a user tries to send an SMS during that time, they will be either warned or prevented (based on the next setting). This will apply first to the lead timezone and second to the user timezone if the lead does not have a timezone selected. The default time range is 8a - 8p and the check box is not selected. If the check box is selected, all user-triggered SMS message options in the window will be disabled until the lead's timezone is within the defined range. This setting includes an override option for the user.
  - **Allow users to override Timezone Protect check box:** When selected, a warning is provided to the user if they try to text a lead outside timezone protect hours through the messenger window. When not selected, the user will not be able to send SMS messages in the messenger window.
- **Calendar Event SMS Reminder to Lead:** The text of the calendar event reminder to leads is defined in this setting.