

# **cynergi** | **suite**™

## Store Manual

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# Texting Feature

## Opt-In/Out for Text Messaging

Before cynergi|suite™ can send and receive texts from customers, you must subscribe to our SMS Text Messaging service, and customers must be opted-in.

### Opting In

There are two ways customers can opt-in for texting:

- 1) Store employees can send a “Welcome” text and the customer can respond with “Optin”, via the stores SMS phone number.
- 2) If the customer has a valid customer record and their Secondary Phone#/Cell# phone number matches their current phone number, they can opt-in themselves, by texting “Optin” using the stores SMS phone number. See the section “Home Office Setup and Configuration of SMS Texting” later in this document to get the stores SMS phone number.

The opt-in function is done in the **Customer Maintenance** screen. This can be accessed by clicking on the **CUSTOMER CHANGE** button while in a customer’s **Rental Payment** screen, or via **Customer Maintenance (RCUSTMNT)** directly:

		PRIMARY CUSTOMER	ALTERNATE ADDRESS	REFERENCES	EMPLOYER	LANDLORD	2ND CUSTOMER
Last Name:	<input type="text" value="DOE"/>	First Name:	<input type="text" value="JANE"/>				
Account#:	<input type="text" value="118"/>	Contact Name:	<input type="text"/>				
Company Name:	<input type="text"/>	PC:	<input type="text" value="55555"/>	-	<input type="text" value="0000"/>		
Address:	<input type="text" value="123 AVENUE"/>	City/Prov:	<input type="text" value="SMALLTOWN"/>		<input type="text" value="KS"/>		
Address Line 2:	<input type="text"/>	Map Code:	<input type="text" value="01"/>				
Primary Phone#:	<input type="text" value="(316)555-1594"/>	Birth Date:	<input type="text" value="1/01/1980"/>				
Work Phone#/Ext:	<input type="text" value="(316)555-8235"/>	SIN:	<input type="text" value="***.***-001"/>				
Second Phone/Cell:	<input type="text" value="(316)555-6713"/>	Drivers Lic#:	<input type="text" value="K01-23-4567"/>				
Alternate Phone#:	<input type="text" value="(316)555-3903"/>						

Enter the customer’s cell phone number in the **Secondary Phone#/Cell#** field. Then click on the **Send Opt-In Text** button. (You do not have to click save, if you didn’t add/change that number.) Within a few seconds, a text message should appear on the customer’s phone.

**“[Your company name]: Reply ‘optin’ to optin to SMS text messages. By opting-in you agree to receive account and marketing alerts. Msg and data rates may apply. Reply STOP to opt-out.”**

If the customer responds with the ‘optin’ word, they will get this message.

**“[Your company name]: You are now subscribed to receive account updates and offers. Msg frequency varies. Reply #HELP for help, STOP to opt-out.”**

After reloading the **Customer Maintenance** screen you should see the verified information, **Opt Out** button, and the SMS link icon.

		PRIMARY CUSTOMER	ALTERNATE ADDRESS	REFERENCES	EMPLOYER	LANDLORD	2ND CUSTOMER
Last Name:	<input type="text" value="DOE"/>	First Name:	<input type="text" value="JANE"/>				
Account#:	<input type="text" value="118"/>	Contact Name:	<input type="text"/>				
Company Name:	<input type="text"/>	PC:	<input type="text" value="55555"/>	-	<input type="text" value="0000"/>		
Address:	<input type="text" value="123 AVENUE"/>	City/Prov:	<input type="text" value="SMALLTOWN"/>		<input type="text" value="KS"/>		
Address Line 2:	<input type="text"/>	Map Code:	<input type="text" value="01"/>				
Primary Phone#:	<input type="text" value="(316)555-1594"/>	Birth Date:	<input type="text" value="1/01/1980"/>				
Work Phone#/Ext:	<input type="text" value="(316)555-8235"/>	SIN:	<input type="text" value="***.***-001"/>				
Second Phone/Cell:	<input type="text" value="(316)555-6713"/>	Drivers Lic#:	<input type="text" value="K01-23-4567"/>				
Alternate Phone#:	<input type="text" value="(316)555-3903"/>						

### Opting Out

There are two ways customers can opt-out of texting:

- 1) Store employees can opt-out customers by going to their customer record and clicking the **Opt Out** button next to the Secondary Phone#/Cell# field. You are required to Save the record to complete the process.
- 2) Customers can opt-out themselves by replying **“STOP.”**

In both of these scenarios, the Secondary Phone#/Cell# will still remain in the customer’s record, but only that number has been opted-out of texting. Furthermore, any texting history that has transpired while opted-in will still be retained

### Default Store Number on the Customer Record

The **Default Store#** field is at the bottom of the *Primary Customer* section of the **Customer Maintenance** screen. This is the store location that will be tied to any incoming text messages from this customer. The store opting-in the customer for text messaging should verify or change the **Default Store#** so that it is their store number. If **Default Store#** is left at 0, any text replies sent by the customer will only be viewable by Home Office personnel.

Email Address:

Allow Online Pmt:

Default PO#:

Default Store#:

### Customer Opt In/Out Report (From Yesterday)

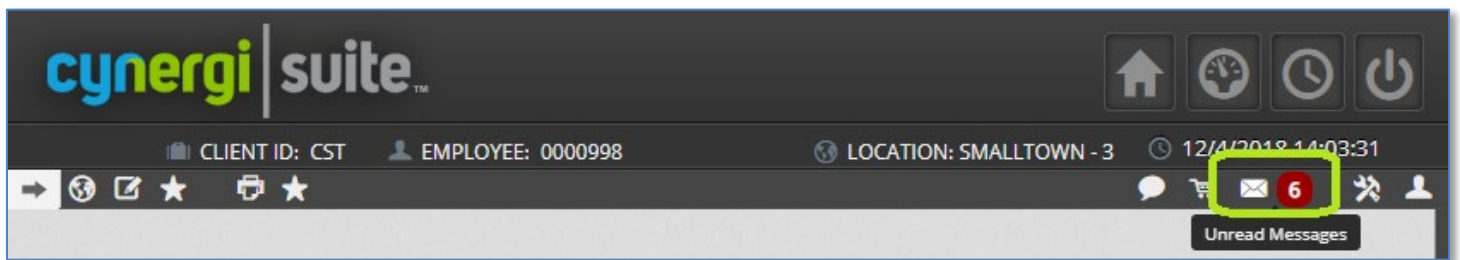
A new report called **Optin In/Out Report** will be generated daily showing customers who opted-in and opted-out from the previous day. The report is split into two sections: Customers Opted-In and Customers Opted-Out. This report is sent to The Reportal and also can be emailed to the Texting Administrator of your company. This report only shows which customers have changed their opt-in/out status. This is not a complete list of everybody who is opted-in or out.

Store	Account	Customer Name	Date/Time
-----			
**** Customers Opted-IN ****			
2	0020002250	LATOR, JOAQUIN	2018-12-03 10:29:32-05
3	0030000204	KAPWITCH, SOPHIA	2018-12-03 10:14:17-05
5	0050001638	CARPENTER, AMY	2018-12-03 09:32:47-05
6	0060000923	ATWOOD, CHERYL	2018-12-03 10:21:01-05
8	0080002966	REDDEN, WILLIE	2018-12-03 12:47:25-05
Total opted in: 5			
**** Customers Opted-OUT ****			
7	0070001730	RADCLIFFE, WANDA	2018-12-03 01:13:17-05
Total opted out: 1			

## Two-Way Text Messaging

Two-Way Text Messaging is a feature that allows store employees to communicate directly with their customers via text messaging. A customer **MUST** be opted in to Text Messaging to be able to send and receive texts with cynergi|suite. Please see the previous section, **Opt-In/Out for Text Messaging**, to learn how to have a customer opt-in to text messages.

After having Two-Way Text Messaging set up and enabled, you will notice a new icon on the **App Bar** of cynergi|suite:



This icon will take you to the **Text Messaging Queue** screen (**TXTQUEUE**) where you can view unread text messages from customers. The number in the red circle indicates the number of unread text messages.

The number beside the icon will indicate either the number of unread text messages for your store only, or all stores, based upon the employee's security settings.

After clicking on the **Envelope** icon, you will be taken to the **Unread Messages** screen:

UNREAD MESSAGES								1
Customer	Acct	Store	Message	Date	Time	Actions		
TIFFANY [REDACTED]	003000069	3	How much do I have left ?	2018/12/04	9:02:28	[Person] [Shopping Cart]		
RACHEL [REDACTED]	000001961	3	I can stop by later today thank you	2018/12/04	9:05:27	[Person] [Shopping Cart]		
SARAH [REDACTED]	000600837	3	I get paid Friday	2018/12/04	9:05:49	[Person] [Shopping Cart]		
MICHAEL [REDACTED]	003002874	3	jus pick it up k thx	2018/12/04	9:13:02	[Person] [Shopping Cart]		
MATTHEW [REDACTED]	000301024	3	What's the largest curved TV you have?	2018/12/04	9:15:22	[Person] [Shopping Cart]		



Showing 1 to 5 of 5 entries

NEW MESSAGES | ALL MESSAGES | CUSTOMER LIST | MARK ALL AS READ | ← BACK | MAIN MENU

The **Unread Messages** screen shows a list of customers who have sent text messages to cynergi|suite. From this screen, you will be able to view and respond to these text messages from your opted in customers. This view includes unread text messages from multiple customers, with their most recent message displayed, and what time and date they were sent.

From the **Text Queue** screen, there are several options available:





















- Click anywhere on the row to open a floating pop-up window of the customer’s texting conversation, and you can reply to them.
- The sorting can be changed by clicking on the heading at the top of any column. You can sort messages by Customer, Account Number (Acct), Store Number, Message, Date, or Time.
- You can use the search option at  the top of the screen to search by Store Number, Customer Number, Customer Name, or a keyword
- In the **Actions** column, there are two icons:

-  By clicking on the on the first icon, you can view the **Customer Record**.
-  By clicking on the second icon, you will be taken to the **Rental Payment** screen.

- The buttons at the bottom of the screen do the following:

<b>NEW MESSAGES</b>	Displays only <i>new unread</i> text messages
<b>ALL MESSAGES</b>	Displays <i>all messages</i> even those marked as read
<b>CUSTOMER LIST</b>	Displays a list of <i>all customers</i> who have opted into text messaging
<b>MARK ALL AS READ</b>	Marks <i>all messages</i> as being read

Clicking on the **CUSTOMER LIST** button provides a list of opted-in (verified) customers:

VERIFIED CUSTOMERS					
Customer	Phone Number	Acct	Store	Actions	
AARON [REDACTED]	3165553658	000000776	3	 	
AARON [REDACTED]	3165553127	000600848	6	 	
ABBY [REDACTED]	3165556259	000000077	4	 	
ABEL [REDACTED]	3165550397	000000389	1	 	
ABIGAIL [REDACTED]	3165555692	000000252	1	 	
ADA [REDACTED]	3165555628	000001938	6	 	
ADAM/MEGAN [REDACTED]	3165553187	000600850	6	 	
AIRRION [REDACTED]	3165551137	000000158	3	 	
ALAN [REDACTED]	3165552883	000000913	1	 	
ALAN [REDACTED]	3165550276	000001928	2	 	

Showing 1 to 10 of 620 entries 1 2 3 4 5 Next Last

NEW MESSAGES
ALL MESSAGES
CUSTOMER LIST
MARK ALL AS READ

← BACK
🏠 MAIN MENU

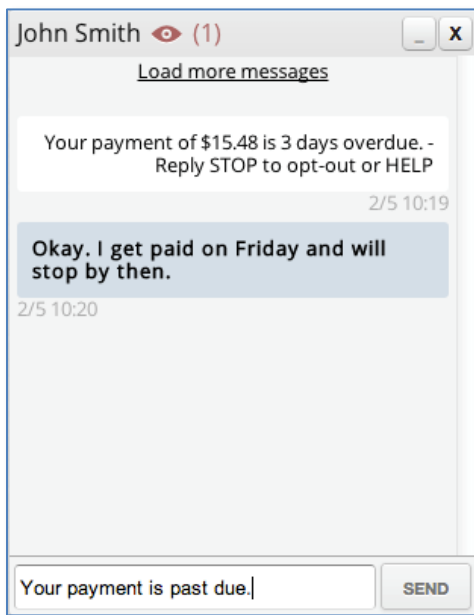
*Please Note: Seeing only your store’s customers, or all stores’ customers, is determined by department security.*


You can also start a text conversation with a customer from this screen by clicking anywhere on their row, even if they do not have an unread message in the previous main screen.

Furthermore, since this is another view in the **Text Queue**, all the functionality exists to be able to sort, search, access the **Customer** record, access the **Rental Payment** screen, mark all texts read, as well as switch to New and All Text Messages.

## How to Initiate a Text Conversation or Respond to a Customer

To initiate a conversation with a customer, simply click on the row of the customer, and a floatable pop-up conversation window will appear on your screen.



- Inside the conversation box, you will be able to see previous conversations with the date and time of the message displayed below each message.
- Click in the **bottom** box to type a text message, and click the **SEND** button (or press the **ENTER** key) to send the message. This process will also mark unread messages in the conversation window as “read.”
- Click on the **Eye** icon  at the top of the box to mark all messages in the conversation as read.
- Click on **Load more messages** to load past messages from this customer.
- Click on the **\_** button to minimize the conversation into a small bar. The button will then change to **^** to re-expand it back to normal view.
- Click on the **X** button to close the conversation window.
- Multiple texting conversations can be active on the screen at any time and can be moved anywhere on the screen.
- You can also navigate to other cynergi | suite screens and menus with texting conversation windows open.

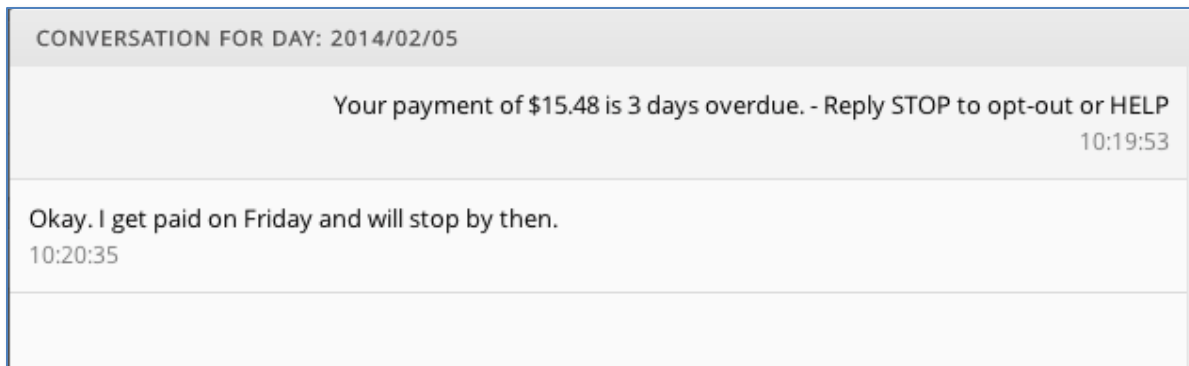
## Accessing Text Conversations from the Call History Screen

Any time a text message is sent or received, an entry is made in the **Call History** for that customer.


In the **Call History** screen, you will see one record for each day where a text message exists. Two-Way text messages will begin with the prefix “Text Message.”

CALL HISTORY LIST						
Date	Time	Comment	Employee			
12/04/18	09:02:28	Text Message: How much do I have left ?	2-Way SMS			✕
12/04/18	09:02:22	Text Message: #PAY █████	2-Way SMS		✎	✕
12/04/18	09:01:12	Text Message: Just a friendly reminder that your payment is due today.	2-Way SMS			✕
12/03/18	09:05:39	Text Message: Just a friendly reminder that your payment is due tomor	2-Way SMS			✕
12/01/18	09:01:54	Text Message: Happy Birthday from WeRentIt! Get a week free on any	2-Way SMS			✕

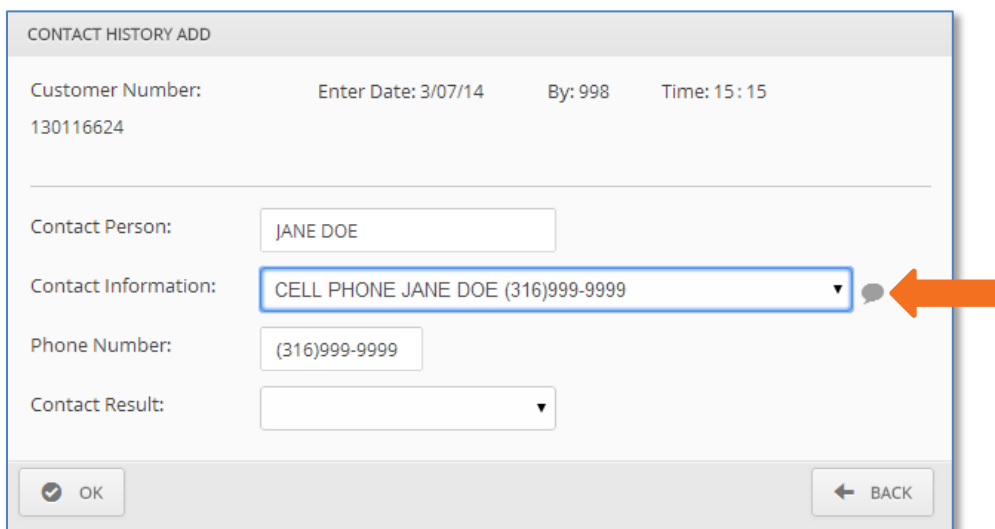
To see the entire customer conversation for the day, click on the **Text** icon .



### Initiating Text Conversations from the Collections Screen

While working collection calls for an opted in customer, if you select the cell phone number in the contact information, the **Text** icon  will appear. By clicking this icon, you will have added functionality to start a text conversation immediately with that customer.

*Please Note: This only applies to cell phone numbers of customers that have opted in to text messaging through the Customer Maintenance screen.*



After clicking the **Conversation** icon, a floatable pop-up conversation window will pop-up on the screen.

### Initiating Text Conversations from the Customer Maintenance Screen

By clicking the envelope icon..

Primary Phone#:		(316)555-1594	
Work Phone#/Ext:		(316)555-8235	
Second Phone/Cell:		(316)555-6713	Verified    Opt Out

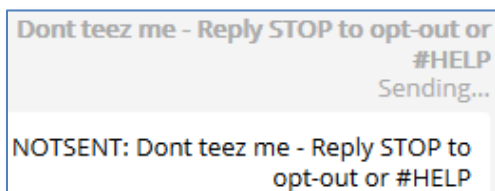
## Text Messaging Keywords

Customers can send short keywords to get automated information about their accounts and send commitments. Customers can also send **#HELP** to get a listing of all these keywords available for them to use.

*Please Note: The keywords are not case sensitive, meaning they will work in upper or lower case.*

- **#LOOKUP** – Provides the customer the **Total Balance** due for ALL Agreements
- **#BAL** – Provides the customer the **Balance Due** and **Due Date** for each Agreement
- **#EPO** – Provides the customer the **Early Purchase (EPO)** Amount for each Agreement
- **#REC** – Provides the customer the total amount available or owed in **Receivables**
- **#BB** – Provides the customer their **Bonus Bucks/Rewards Balance**
- **#WBI** – Automatically creates a **Commitment** within the cynergi|suite store system for the date and time specified
- **#PAY** – Initiates an Online Payment (only applies for customers who have enrolled in the the cynergi|suite Online Payments feature and have their phone number registered)
- **#PAYTODAY** – Initiates an Online Payment for only the agreements due today (only applies for customers who have enrolled in the the cynergi|suite Online Payments feature and have their phone number registered)
- **#PAYTM** – Initiates an Online Payment for only the agreements due tomorrow (only applies for customers who have enrolled in the the cynergi|suite Online Payments feature and have their phone number registered)
- **#PAYLATE** – Initiates an Online Payment for only the late agreements (only applies for customers who have enrolled in the the cynergi|suite Online Payments feature and have their phone number registered)

## Inappropriate Text Messages



- *Outbound* text messages sent by store employees deemed inappropriate based on an algorithm will be blocked and will not be sent to the customer. “**NOTSENT**” will appear in the text conversation window.
- *Inbound* text messages will not be filtered and will be able to be viewed in the text conversation window.

## Text Messaging Reports

A new report called **All Text Messages (From Yesterday)** will be generated daily showing all incoming/outgoing text messages from the previous day. The report is generated by Customer Name and then by Date/Time sequence by customer. This report is sent to the Reportal and emailed to the designated Texting Administrator email address.

Customer Name	Str	Employee	Date/Time	Messages
RUN DATE: 06/18/14 Corporate RTO - CustAcceptHTI.cynergi.com PAGE: 1 TIME: 04:03:10 All Text Messages From Midnight yesterday				
JASON SMITH	1	998	06/17 15:55:17	Will u be coming in after work today? - Reply STOP to opt-out or HELP
JASON SMITH	1		06/17 15:55:57	Yes... It Should be around 6:00 or so.
JASON SMITH	1	998	06/17 15:56:10	Great...we will see you then. - Reply STOP to opt-out or HELP
JASON SMITH	1		06/17 15:57:35	BTW...did u ever get the 3d BLU ray players in? I still am interested in one.
JASON SMITH	1		06/17 15:58:19	Hello?
JASON SMITH	1	998	06/17 16:05:25	Yes. They will be here on Friday. you should come by and I'll write up an agreement for y ou to take it home. - Reply STOP to opt-out or HELP
JASON SMITH	1		06/17 16:21:37	Yes...I want to see it. How late are u open in Friday?
JASON SMITH	1	998	06/17 16:22:07	we will be here until 8:00. We will see you then. I think you'll love it!! - Reply STOP to opt-out or HELP
LUCINDA CARTER	1	998	06/17 16:44:53	Thank you for signing up for text messages. Come by and see us this week! - Reply STOP t o opt-out or HELP
LUCINDA CARTER	1		06/17 16:52:45	No, thank you! I would go see YOU anytime!
PETE DAWSON	1	998	06/17 16:23:48	Can you come in after work and pay \$45? I'll waive the rest of the late fees. - Reply ST OP to opt-out or HELP
PETE DAWSON	1		06/17 16:25:26	Yes...I can come in around 5:30.
PETE DAWSON	1	998	06/17 16:30:01	Great. Will see you in an hour. - Reply STOP to opt-out or HELP

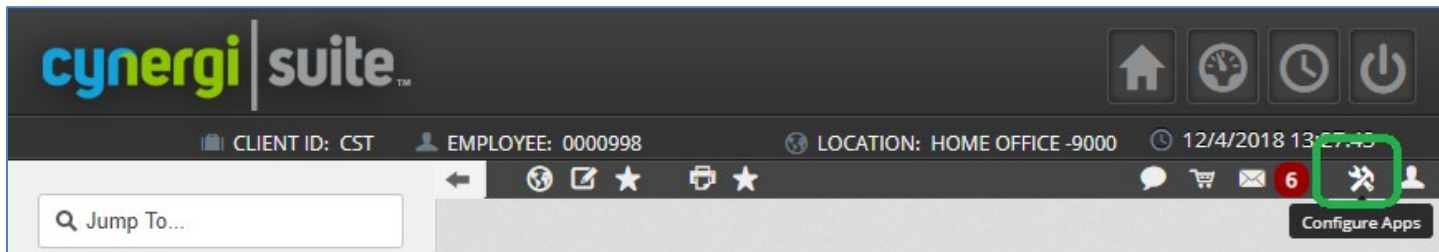
Another new report called **Inappropriate Text Messages (For Yesterday)** will be generated daily showing any inappropriate inbound text messages. Inappropriate outbound messages (displaying as NOTSENT in the text conversation window) will also be reported. This report is emailed to the designated Texting Administrator email address. If there are no inappropriate words in the report, the subject line will be pre-fixed with "No."

Customer Name	Store	Employee	Date/Time	Messages
RUN DATE: 06/24/15 Test Cfg01 Corporate RTO - cst134 PAGE: 1 TIME: 08:47:54 Inappropriate Text Messages For Yesterday				
CHRIS MCGUIRE	2	0	2015-06-24 08:47:24	Teez from cell phone
CHRIS MCGUIRE	2	998	2015-06-24 08:46:11	NOTSENT: Dont teeze me - Reply STOP to opt-out or #HELP
DEBBIE SAWYER	7	0	2015-06-24 08:47:24	Teez from cell phone
DEBBIE SAWYER	7	998	2015-06-24 08:46:11	NOTSENT: Dont teeze me - Reply STOP to opt-out or #HELP
DOUG MABLEY	0	0	2015-06-24 08:47:24	Teez from cell phone
DOUG MABLEY	0	998	2015-06-24 08:46:11	NOTSENT: Dont teeze me - Reply STOP to opt-out or #HELP
IAN HOWARD	2	0	2015-06-24 08:47:24	Teez from cell phone
IAN HOWARD	2	998	2015-06-24 08:46:11	NOTSENT: Dont teeze me - Reply STOP to opt-out or #HELP
SHIRLEY JOHNSTO	2	0	2015-06-24 08:47:24	Teez from cell phone
SHIRLEY JOHNSTO	2	998	2015-06-24 08:46:11	NOTSENT: Dont teeze me - Reply STOP to opt-out or #HELP
TRST MCGUIRE	2	0	2015-06-24 08:47:24	Teez from cell phone
TRST MCGUIRE	2	998	2015-06-24 08:46:11	NOTSENT: Dont teeze me - Reply STOP to opt-out or #HELP

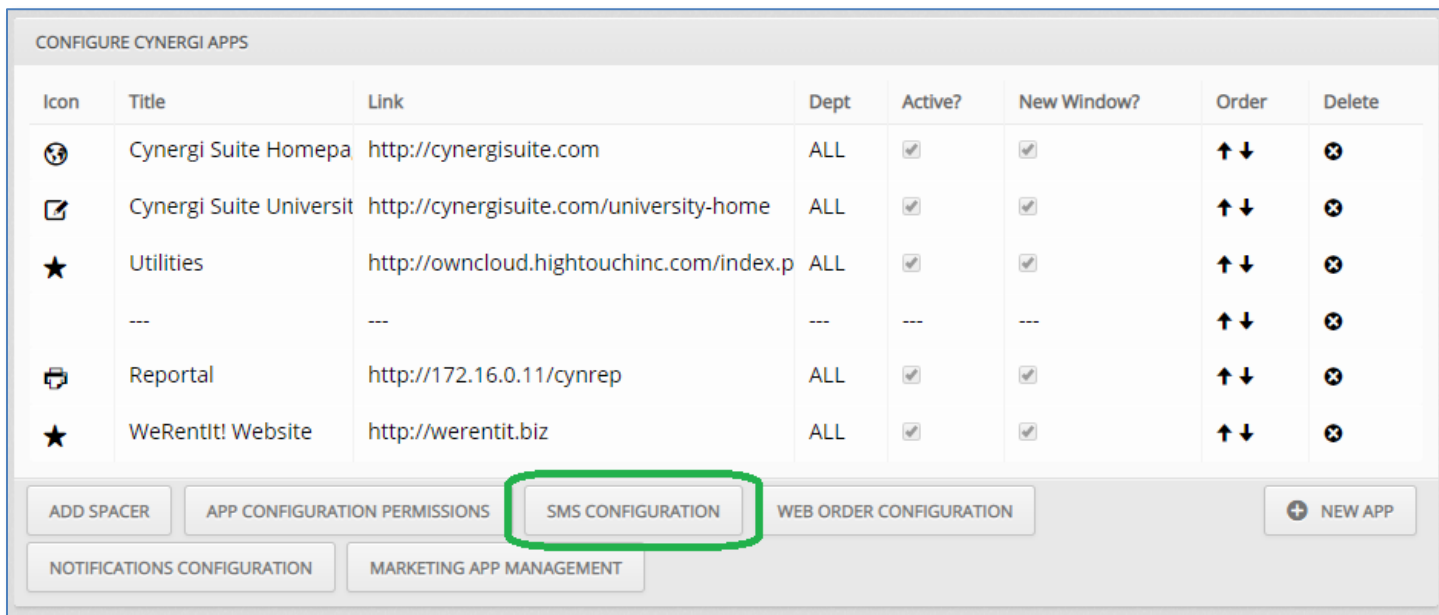
## Home Office Setup and Configuration of SMS Texting

Based on security, Home Office personnel will have the ability to edit some of the texting configuration settings using the **Configure**

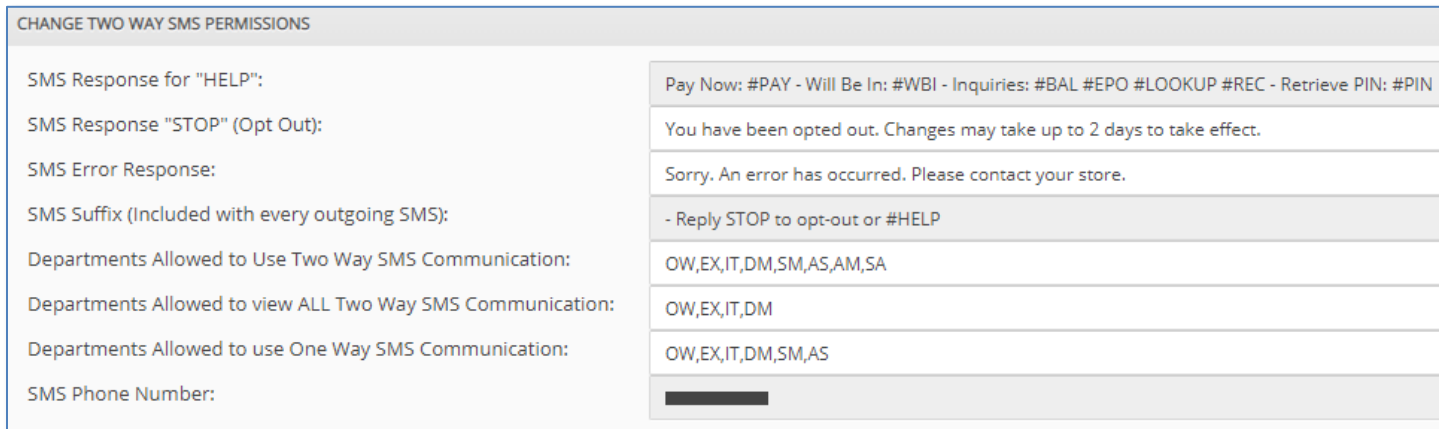
**Apps** (Tool) icon .



After clicking on the **Configure Apps** icon, you will see an **SMS CONFIGURATION** button at the bottom of the **Configure Cynergi Apps** screen.



The **Change Two Way SMS Permissions** screen will appear. There are two configuration sections within this screen.



- 1) **SMS Response for “HELP”:** The message your customers will receive if they text the word **HELP**.
- 2) **SMS Response “STOP” (Opt Out):** The message your customers will see when they opt-out of text messaging. The default message is “You have been opted out. Changes may take up to 2 days to take effect.”
- 3) **SMS Error Response:** The message customers receive when an error occurs when processing a text they sent. Typically, this is in response to a customer not being opted-in, but if this occurs on multiple customers, or persists, please call cynergi | suite support at 855-CYN-ERGI.
- 4) **SMS Suffix (Include with every outgoing SMS):** Default is “- Reply STOP to opt-out or #HELP.”  
*Please Note: At this time, this text is legally required at the end of all messages and cannot be modified.*
- 5) **Departments Allowed to Use Two Way SMS Communication:** Defines which department codes (based on Department Maintenance [DEPTMNT]) are allowed to use Two-Way SMS communication. Separate department codes with commas, or type **ALL** to allow all employees. Employees belonging to the departments specified here will see the Envelope icon in the **App Bar**, and the number of unread messages *only for their store*. We recommend choosing sales associates and above.
- 6) **Departments Allowed to view ALL Two Way SMS Communication:** Defines which department codes are allowed to view messages from customers from ALL locations (not just their currently-logged-in location). Employees belonging to the departments specified here will see the Envelope icon in the **App Bar** and the number of unread messages *total for all stores*. We recommend keeping this restricted, such as company/franchise owners, executives, home office personnel, I.T. personnel, regional/district managers and others who work in multiple locations.
- 7) **Departments Allowed to use One Way SMS Communication:** Defines which department codes are allowed to enter one-way SMS communication (Texting Campaigns). Employees belonging to the departments specified here will see the **Quote Bubble** icon in the **App Bar**. We recommend assistant managers and above.
- 8) **SMS Phone Number:** This is the phone number that cynergi | suite is using for sending and receiving texts. This phone number is the same for all locations in your company. This is provided here as information only and cannot be changed. Customers wishing to opt-in and already have a unique, valid phone number in their Secondary Phone#/Cell# field can send “**optin**” to this number to opt-in.

The bottom section lists each of the potential “keywords” that are possible to allow the customers to use as Keywords.

### Text Messaging Keywords

Check the options you want to make available to your customers

*\*\* Laws on text messaging to customers may vary from state to state, please validate legal requirements in your area before implementation.*

- #LOOKUP - Returns the total balance due for all agreements
- #BAL - Returns the balance due and date due for each agreement
- #EPO - Returns the early purchase amount for each agreement
- #REC - Returns the total amount available or owed in Receivables
- #BB - Returns the Bonus Bucks/Rewards Balance
- #WBI - Automatically create a commitment within the cynergi | suite system
- #PAY - Initiates an OLP if enrolled and enabled
- #PAYTODAY - Initiates an OLP for only the agreements due today if enrolled and enabled
- #PAYTM - Initiates an OLP for only the agreements due tomorrow if enrolled and enabled
- #PAYLATE - Initiates an OLP for only the late agreements if enrolled and enabled

- Selecting the checkbox to the left of the Keyword will make it an available keyword.
- Having the box unselected will not allow this Keyword.
- If a customer texts “**#HELP**,” only the keywords checked will be included in the reply.

Hovering your mouse cursor over each line will provide a more detailed description:

- #LOOKUP - Returns the total balance due for all agreements
- #BAL - Returns the balance due and date due for each agreement
- #EPO - Returns the early purchase amount for each agreement
- #BFC - Returns the total amount available or owed in Receivables

Allow the customer to see their total agreement balance due

**Further explanations:**

**#WBI:** Allows customer to post commitments. Customers can further specify dates and times by including M, T, W, TH, F, and S for the respective days of the week, plus a time in hh:mm format. For example, **#WBI F 5:00PM** will post a commitment for Friday by 5pm.

**#PAY:** If you subscribe to cynergi|suite’s Pay-by-Text/Pay-by-Phone feature, this keyword allows a customer who has a saved and default payment method in their Online Payment Account to quickly and easily make a regular-amount payment to their agreements on rent by texting **#PAY**.

**#PAYTODAY:** If you subscribe to cynergi|suite’s Pay-by-Text/Pay-by-Phone feature, this keyword allows a customer who has a saved and default payment method in their Online Payment Account to quickly and easily make a regular-amount payment to only their agreements that are due today on rent by texting **#PAYTODAY**.

**#PAYTM:** If you subscribe to cynergi|suite’s Pay-by-Text/Pay-by-Phone feature, this keyword allows a customer who has a saved and default payment method in their Online Payment Account to quickly and easily make a regular-amount payment to only their agreements that are due tomorrow on rent by texting **#PAYTM**.

**#PAYLATE:** If you subscribe to cynergi|suite’s Pay-by-Text/Pay-by-Phone feature, this keyword allows a customer who has a saved and default payment method in their Online Payment Account to quickly and easily make a regular-amount payment to only their agreements that are late on rent by texting **#PAYLATE**.


**optin:** This allows a customer to opt-in to texting themselves. This feature works if a correct and valid phone number is already in their Secondary Phone#/Cell# record in their customer record in cynergi|suite, and the phone number must not be shared among other customers in cynergi|suite.

ALL DETAILED TEXTS				
Name	Account	Phone	Date Sent	Message
COLTON █████	000000360	██████9105	2018-12-04 09:04:58.19338	URGENT!!! It is very important you contact █████ today to avoid pos
ROCHELLE █████	000001494	██████8795	2018-12-04 09:04:58.19338	URGENT!!! It is very important you contact █████ today to avoid pos
JACOB █████	000001982	██████0607	2018-12-04 09:04:58.19338	URGENT!!! It is very important you contact █████ today to avoid pos
AMELIA █████	000104807	██████0610	2018-12-04 09:04:58.19338	URGENT!!! It is very important you contact █████ today to avoid pos
TRACY █████	000201979	██████0008	2018-12-04 09:04:58.19338	URGENT!!! It is very important you contact █████ today to avoid pos
D ANN █████	000700334	██████9150	2018-12-04 09:04:58.19338	URGENT!!! It is very important you contact █████ today to avoid pos
KEITH █████	000000022	██████2045	2018-12-04 09:04:31.19058	Your █████ is more than seven days past due. You must call the store
COLTON █████	000000360	██████9105	2018-12-04 09:04:31.19058	Your █████ is more than seven days past due. You must call the store
TAMERA █████	000000744	██████5825	2018-12-04 09:04:31.19058	Your █████ is more than seven days past due. You must call the store
ZUMAYED █████	000000774	██████7653	2018-12-04 09:04:31.19058	Your █████ is more than seven days past due. You must call the store

## One-Way Text Messaging

One-Way Text Messaging allows select employees to set up texting campaigns that can be automatically delivered to multiple customers at once. Examples of campaigns can be recurring reminders about due-tomorrow, due-today and past-due payments. Other examples can be to notify customers of upcoming sales events or to offer them a special for their birthday.

### How to Add an Autotext Campaign

A **Quote Bubble** icon  will appear on cynergi|suite's **App Bar** if your company is set up for text messaging, and you belong to a department code who allows access to managing one-way texting campaigns.

*Please Note:* A message created in the **Text Message Campaign** screen can be sent to ANY customer in your company who has opted in for text messaging.

After clicking on the **Quote Bubble** icon, the **Text Message Campaign** screen will appear:

**CREATE/EDIT TEXT MESSAGE CAMPAIGN**

Enter name of Campaign:

**SCHEDULE**

Frequency: One-Time

Daily

Every 1 day(s)

Weekly

Every Weekday

Monthly

Hour to send text messages: 9 AM

**RANGE OF RECURRENCE**

Start: 12/04/2018

**FILTER BY**

# Days Late  

# Days Late Range   to

Due Tomorrow

Due Today

Customers with Birthday In Month

Filter by Default Store: 0 - Home Town Rental Purch

**ENTER TEXT MESSAGE TO BE SENT** SEND TEST

- Reply STOP to opt-out or #HELP 32/160

ACCT NBR
CELL
FIRST NAME
LAST NAME

BONUS BUCKS
RECEIVABLE AMT

CANCEL
SAVE

The **Enter name of Campaign** field is a 12-character field to name the campaign you are creating. This identifier needs to be unique and cannot be used for other campaigns.

The campaign can be activated or deactivated any time by clicking on the **ACTIVE/INACTIVE** slider bar.



The **Schedule** section allows customization of how often to run the text message campaign, and on which days or what times. You can set up the campaign Frequency as a **One-Time Campaign** or as a **Recurring Campaign**. With a Recurring Campaign, there are multiple scheduling choices including a start and ending date range. Options below:

**Daily:**

Daily      Every  day(s)  
 Weekly      Every Weekday  
 Monthly

**Weekly:**

Daily     Every  week(s) on  
 Weekly      SUN  MON  TUE  WED  THU  FRI  SAT  
 Monthly

**Monthly:**

Daily      Day  of every  month(s)  
 Weekly      First  Sunday of every  month(s)  
 Monthly

Opted-in customers can be filtered to receive the message based on:

- A specific number of days late
- A range of number of days late
- Due tomorrow
- Due today
- Have birthdays in the month at the time the campaign is running

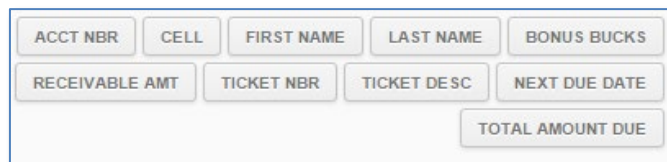
Upon selecting a filter criterion, two more options appear. Clicking the checkbox will do the following:

- Ignore Customers with Commitments** – this will not send a customer a text message if they have a commitment recorded in cynergi | suite.
- Only send 1 text message per Customer** – this will limit the text messages to only one per customer so customers will only receive one text message regardless of how many agreements they have.

*Please Note: Exercise caution when setting up a range and filter to ensure they make sense. For example, creating a campaign for customers who have birthdays in the current month to tell them “Happy Birthday” but having it set to Daily would then send daily texts to these customers every day within the month of their birthday.*

The final part to creating the campaign is creating the body of the message to be sent. Text messages are limited to a total of 160 characters and are required to have the phrase “– **Reply STOP to Opt-out or HELP**” included at the end of each message. This leaves 128 characters for the body of your message.

In creating the text message, there are buttons available to help personalize the text message by including certain aspects of the customer record such as their Name and Customer Account Number. If filtering by due dates, other personalization button options for the Rental Agreement/Ticket info will also become available.



The **SEND TEST TEXT** button can be used to send a test text to a cell phone number of your choice. Simply click the button and the system will prompt you for a phone number to send the test text message.

Any time a text message campaign is created or edited, an email is sent to the designated Texting Administrator email address.

## How to Edit an Autotext Campaign

At the bottom half of the main **Text Message Campaign** screen, all the previous active and inactive campaigns are listed. To edit an existing campaign, just click on the row containing the campaign to be edited, and its settings will display. You may also easily turn a campaign on or off by clicking the **ON/OFF** slider bar on the left side of this screen.

CURRENT CAMPAIGNS									
	Name	One-Time	Hour	Text	Created Date	Last Sent	Last Updated	Last Updated By	
<input checked="" type="checkbox"/>	MONTHLY_DUE_	Yes	11	Your account [CUST-ACCT-NBR] i...	12-05-13 10:35	Never	12-05-13 10:35	998	
<input checked="" type="checkbox"/>	CHRISTMAS2_	Yes	9	[CUST-FIRST-NAME-MI][CUST-LAST-...	11-26-13 16:02	Never	11-26-13 16:02	998	
<input checked="" type="checkbox"/>	THANKSGIVING	Yes	13	[CUST-FIRST-NAME-MI][CUST-LAST-...	11-26-13 16:03	Never	11-26-13 16:03	998	
<input checked="" type="checkbox"/>	PAST_DUE_2_	No	10	[CUST-FIRST-NAME-MI][CUST-LAST-...	11-26-13 15:41	Never	11-26-13 15:41	998	
<input checked="" type="checkbox"/>	PAST_DUE_1_	No	9	[CUST-FIRST-NAME-MI][CUST-LAST-...	11-26-13 15:39	Never	11-26-13 15:39	998	

## Autotext Campaign Result Screens

Results of recently-ran One-Way Texting Campaigns can be viewed by clicking on either of the two buttons that are located at the bottom left of the the **Create/Edit Text Message Campaign** screen:



## Autotext Campaign Parameters.

Only allow campaigns to run between these two 24 hour times. If a campaign is running when the Stop Processing hour is reached or the machine is rebooted. It stops the campaign and restarts where it left-off, on the next day at 8:00 am.

## Campaign Parameters

Campaign Start Processing Hour (24-Hour time):

10

Campaign Stop Processing Hour (24-Hour time):

17

### Campaign Results

Clicking the **CAMPAIGN RESULTS** button will display the completed campaigns along with their *ID, Name, Date Sent, Message,* and the *Number (#) of customers* to whom the text was sent.

COMPLETED CAMPAIGNS				
ID	Name	Date Sent	Message	# of Customers Sent To
6763	SEVERLY_PAST	2018-12-04 09:04:58.19338	URGENT!!! It is very important...	6
6762	7PLUSLATE4__	2018-12-04 09:04:31.19058	Your [REDACTED] is more t...	13
6761	7DAYLATE2___	2018-12-04 09:04:00.00783	Your [REDACTED] is 7 day...	1
6760	5DAYLATE2___	2018-12-04 09:03:14.8638	Your [REDACTED] is almost...	2
6759	PASTDUE1____	2018-12-04 09:02:45.62627	Just a friendly reminder that y...	13
6758	DUETOMORROW_	2018-12-04 09:02:22.25071	Just a quick reminder that [REDACTED]...	15
6757	DUE_TODAY__	2018-12-04 09:01:50.95302	A friendly reminder that your [REDACTED]...	8
6756	14DAYSLATE__	2018-12-04 09:01:06.95953	Just a friendly reminder that y...	32
6755	BIRTHDAY____	2018-12-03 09:05:38.64801	Wishing you the best birthday e...	55
6754	SEVERLY_PAST	2018-12-03 09:05:20.93753	URGENT!!! It is very important...	9

« Page 1 of 677, Displaying 1 - 10 of 6763 Results »

If one of the **Completed Campaigns** are selected, the **Campaign Details** screen will appear. This will show each person to whom the text was sent, including their *Name, Account Number, Phone Number, Date Sent,* and *Message*.

CAMPAIGN DETAILS				
Name	Account	Phone	Date Sent	Message
COLTON [REDACTED]	000000360	[REDACTED]9105	2018-12-04 09:04:58.19338	URGENT!!! It is very important you contact [REDACTED] today to avoid po
ROCHELLE [REDACTED]	000001494	[REDACTED]8795	2018-12-04 09:04:58.19338	URGENT!!! It is very important you contact [REDACTED] today to avoid po
JACOB [REDACTED]	000001982	[REDACTED]0607	2018-12-04 09:04:58.19338	URGENT!!! It is very important you contact [REDACTED] today to avoid po
AMELIA [REDACTED]	000104807	[REDACTED]0610	2018-12-04 09:04:58.19338	URGENT!!! It is very important you contact [REDACTED] today to avoid po
TRACY [REDACTED]	000201979	[REDACTED]0008	2018-12-04 09:04:58.19338	URGENT!!! It is very important you contact [REDACTED] today to avoid po
D ANN [REDACTED]	000700334	[REDACTED]9150	2018-12-04 09:04:58.19338	URGENT!!! It is very important you contact [REDACTED] today to avoid po

« Page 1 of 1, Displaying 1 - 6 of 6 Results »

### Campaign Detailed Search

Clicking the **CAMPAIGN DETAILED SEARCH** button will display a screen of **All Detailed Texts** that were sent. This is basically the **Campaign Details** screen. However, the texts are not split out by specific campaigns. Clicking within the search bar and typing in words for a search will narrow the listing of this **All Detailed Texts** screen.

ALL DETAILED TEXTS				
Name	Account	Phone	Date Sent	Message
COLTON [REDACTED]	000000360	[REDACTED]8105	2018-12-04 09:04:58.19338	URGENT!!! It is very important you contact [REDACTED] today to avoid po
ROCHELLE [REDACTED]	000001494	[REDACTED]8795	2018-12-04 09:04:58.19338	URGENT!!! It is very important you contact [REDACTED] today to avoid po
JACOB [REDACTED]	000001982	[REDACTED]0607	2018-12-04 09:04:58.19338	URGENT!!! It is very important you contact [REDACTED] today to avoid po
AMELIA [REDACTED]	000104807	[REDACTED]0610	2018-12-04 09:04:58.19338	URGENT!!! It is very important you contact [REDACTED] today to avoid po
TRACY [REDACTED]	000201979	[REDACTED]0008	2018-12-04 09:04:58.19338	URGENT!!! It is very important you contact [REDACTED] today to avoid po
D ANN [REDACTED]	000700334	[REDACTED]9150	2018-12-04 09:04:58.19338	URGENT!!! It is very important you contact [REDACTED] today to avoid po
KEITH [REDACTED]	000000022	[REDACTED]2045	2018-12-04 09:04:31.19058	Your [REDACTED] is more than seven days past due. You must call the store
COLTON [REDACTED]	000000360	[REDACTED]8105	2018-12-04 09:04:31.19058	Your [REDACTED] is more than seven days past due. You must call the store
TAMERA [REDACTED]	000000744	[REDACTED]5825	2018-12-04 09:04:31.19058	Your [REDACTED] is more than seven days past due. You must call the store
ZUMAYED [REDACTED]	000000774	[REDACTED]7653	2018-12-04 09:04:31.19058	Your [REDACTED] is more than seven days past due. You must call the store

« Page 1 of 5149, Displaying 1 - 10 of 51490 Results »

## Text Message Integration FAQ

### Texting Feature

- Will I be able to see text messages for all stores or just my store?
  - Both are possible, but is set by security. Based on which department employees belong to, text messages can be viewed for only their store or the entire company.
- What happens when someone who is not a customer texts our company text phone number?
  - Nothing happens. Cynergi|suite simply ignores the message and nothing is sent back to the person who sent the text since it is illegal to text (even reply to) anyone who is not opted-in.
- Will I get unsolicited spam text messages?
  - This coincides with the question above. Unsolicited messages sent to cynergi|suite from numbers who do not match any of your customers' opted-in cell phone numbers will be rejected and not delivered. However, if you receive problematic text messages from opted-in customers, you can opt them out.
- While having a text message conversation with a customer, I started received messages in RED stating, "Customer is not opted in."
  - The customer has opted him/herself out during the text conversation by sending **STOP**. You will not be able to continue the conversation with this customer anymore until they are opted back in. The customer is ultimately in control of opting-in and opting-out to texting.

### Customer Opting In/Opting Out

- Do I have to opt-in a customer to both One-Way Texting and Two-Way Texting separately?
  - No. When a customer opts-in to texting, they are opted-in to both One-Way and Two-Way texting.
- If a customer opts-out of text messaging by sending STOP, how long does it take for the system to opt them out?
  - If the customer is within their cell phone provider's service area, it generally will be within minutes.
- How can I tell if a customer has opted out of text messaging? Do I get a notice?
  - You will not receive a notice unless you have an open text message conversation and the customer opted-out during the conversation. When a customer is opted-out, they will no longer show up in the verified Customer List. Their prior texting history still displays, but the button to send a text will no longer be accessible. Furthermore, on the customer record, there will no longer be a **Verified** label or **Opt Out** button next to the customer cell phone field. Only the **Send Verification Code** button will show. However, a Text Messaging Opt-In/Out Report is available in The Reportal every morning that shows who opted-out (and opted-in) from the previous day.
- The customer shows opted out but they said they never opted-out.
  - Either someone at the store clicked the **Opt Out** button on the customer record, or the word "STOP" was texted from the customer's phone to the store. You will have to go through the opt-in process with the customer again. Cynergi|suite will not automatically opt-out a customer on its own.
  - Another possible scenario is the customer's cell phone number was changed. The customer will need to go through the opt-in process again.
- I have a customer who has opted-in and opted-out several times. What happens to texts in between opted-in and opted-out periods?
  - During the periods while the customer was considered opted-out, the store will not be able to send any text messages to the customer via cynergi|suite, and any text messages sent by the customer to the store will be discarded by cynergi|suite and not delivered. However, any prior text messaging history that occurred during periods while the customer was considered opted-in will still be available in the customer's history and does not clear while being opted-out.

### Return Messages

Below are examples of automatic return messages customers might receive:

**Customer opting-in themselves:**

- Cell phone number is in customer record, **optin** keyword is enabled, customer texted **optin**:
  - *“You’re opted-in to receive texts on acct info and promo texts from **Company Name**. Std msg and data rates apply – Reply STOP to opt-out or #HELP.”*
- Cell phone number is **not** in customer record:
  - *“Your phone is not in the system, please call store.”*
- **optin** keyword is not enabled:
  - No return message.
- Cell phone number is **already** opted-in:
  - No return message.
- Cell phone number exists on multiple accounts:
  - *“Cannot optin, your phone number is on multiple customers, please call store.”*

**Opting out:**

- Customer texted **“STOP”** to opt-out:
  - *“You have been opted out. Changes may take up to 2 days to take effect.”*
- Customer texted **“#HELP”**:
  - Whichever keywords are enabled in SMS Configuration will appear in the reply message.
  - Example: *“#BAL = Balance due each agreement, #BB = Bonus Bucks, #REC - Receivable balance, #EPO = EPO amount for each agreement, #WBI+MTWTHFS+HH:MMam = Make a commitment, #PIN = Return your pin number, #LOOKUP - Your total balance due, #PAY = Make online payment”*

Please Note: The customer no longer needs a PIN to use any texting keywords.