



MyCloud Messenger

Product Manual

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Introduction

MyCloud Messenger 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 MyCloud Messenger account up and running. Self-help is built into the platform for quick tips on how to easily administer and perform common actions. For a more detailed guide, please reference the full product manual.

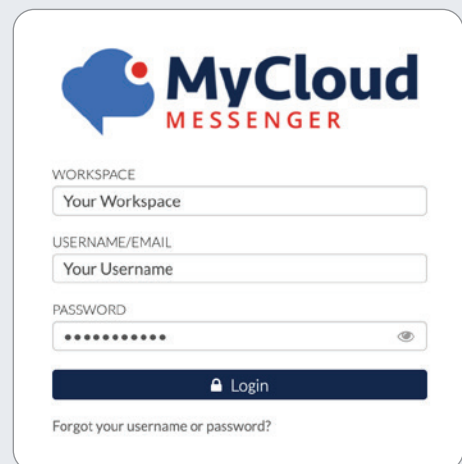
Features

- **Textcast** - Send targeted messages to different audiences based on their unique criteria
- **Timetext**
 - Scheduled - Schedule texts to an individual or a group of recipients
 - Reminders - Automate text reminders for customers relating to a predetermined date/time
 - Interval - Leverage drip campaigns to communicate messaging over a period of time
- **Inbound Text Routing** - Intelligently route inbound text communication to automated responses or queues for 1/1 interaction
- **Keywords** - Trigger an action or set of actions when a contact texts in specific word
- **Live agent interaction** - Have 1/1 conversations with customers to increase customer engagement and satisfaction
- **Open API** - Text-enable software applications to enhance your current workflows and simplify customer communication

Logging In

To login, simply navigate to your company's custom URL or go to <https://portal.mycloudmessenger.com/login> in your favorite browser and enter the account credentials provided to you.

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

The image shows a login form for MyCloud Messenger. At the top left is the MyCloud Messenger logo. Below it are three input fields: 'WORKSPACE' with the placeholder 'Your Workspace', 'USERNAME/EMAIL' with the placeholder 'Your Username', and 'PASSWORD' with a masked password '*****' and an eye icon to toggle visibility. Below the password field is a dark blue 'Login' button with a lock icon. At the bottom, there is a link that says 'Forgot your username or password?'

WORKSPACE
Your Workspace

USERNAME/EMAIL
Your Username

PASSWORD

Login

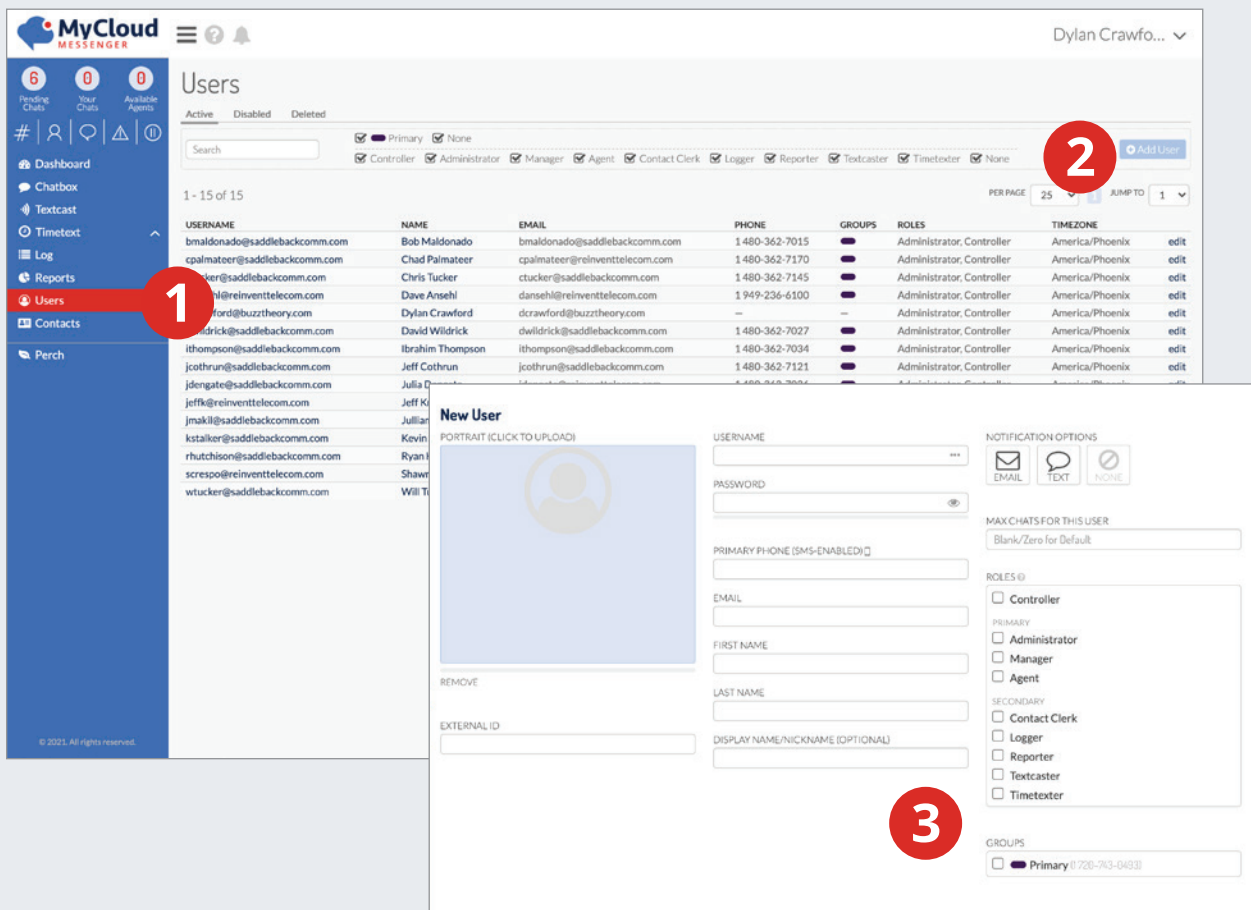
Forgot your username or password?

Adding Users

One of the first things you may want to do is add users to your account. Because MyCloud Messenger charges you only for what you use, build as many users as you need.

To create a user:

1. Click Users in the left-hand menu
 2. Select Add User in the upper right corner of the user screen
 3. Add the user information, assign roles, give group access, and select Save
- *For a description of available roles, click the (?) next to Roles.



The screenshot shows the MyCloud Messenger 'Users' management page. On the left, a navigation menu has 'Users' highlighted with a red circle and the number '1'. In the top right corner of the 'Users' section, there is an 'Add User' button with a red circle and the number '2'. A 'New User' form is overlaid on the bottom right, with a red circle and the number '3' next to it. The form contains fields for Username, Password, Primary Phone, Email, First Name, Last Name, Display Name, External ID, and various role and group selection options.

USERNAME	NAME	EMAIL	PHONE	GROUPS	ROLES	TIMEZONE
bmaldonado@saddlebackcomm.com	Bob Maldonado	bmaldonado@saddlebackcomm.com	1 480-362-7015		Administrator, Controller	America/Phoenix
cpalmateer@saddlebackcomm.com	Chad Palmateer	cpalmateer@reinventtelecom.com	1 480-362-7170		Administrator, Controller	America/Phoenix
ctucker@saddlebackcomm.com	Chris Tucker	ctucker@saddlebackcomm.com	1 480-362-7145		Administrator, Controller	America/Phoenix
dansehl@reinventtelecom.com	Dave Ansehl	dansehl@reinventtelecom.com	1 949-236-6100		Administrator, Controller	America/Phoenix
drcrawford@buzztheory.com	Dylan Crawford	drcrawford@buzztheory.com	--		Administrator, Controller	America/Phoenix
dwildrick@saddlebackcomm.com	David Wildrick	dwildrick@saddlebackcomm.com	1 480-362-7027		Administrator, Controller	America/Phoenix
lthompson@saddlebackcomm.com	Ibrahim Thompson	lthompson@saddlebackcomm.com	1 480-362-7034		Administrator, Controller	America/Phoenix
jcothrun@saddlebackcomm.com	Jeff Cothrun	jcothrun@saddlebackcomm.com	1 480-362-7121		Administrator, Controller	America/Phoenix

Note: you can easily edit your active users to make changes on the fly or even temporarily disable or delete them completely.

Adding Contacts

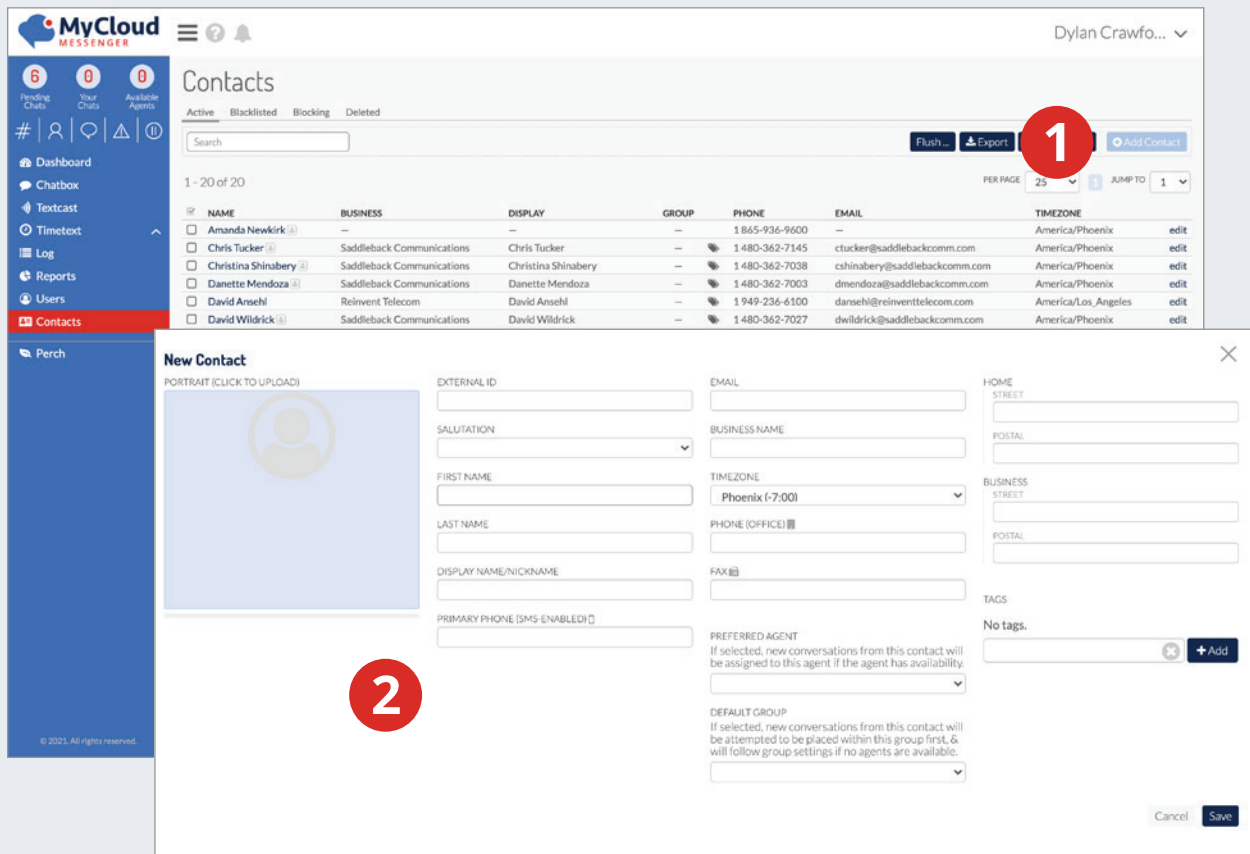
Since your engagement is built around your contacts themselves, knowing how to add and segment contacts is key. Contacts can be found in the left-hand menu.

Adding a single contact

To add a contact:

1. Click the Add Contact button
2. Enter the contact details such as name, phone number, and email address
*Primary phone number is required. Adding tags to a contact will allow you to send targeted messages

For example, you may want to send a promotion to all of your gym customers that have the gold membership. For this, you might choose to add both a 'gold' and 'member' tag. This will allow you to send messages to all members when needed, as well as to only those with a gold membership.



The screenshot shows the MyCloud Messenger interface. On the left is a navigation menu with options like Dashboard, Chatbox, Textcast, Timetext, Log, Reports, Users, and Contacts. The main area displays a 'Contacts' list with columns for NAME, BUSINESS, DISPLAY, GROUP, PHONE, EMAIL, and TIMEZONE. A table lists several contacts, including Amanda Newkirk, Chris Tucker, Christina Shinabery, Danette Mendoza, David Ansehl, and David Wildrick. In the top right of this list, a red circle with the number '1' highlights the '+ Add Contact' button. Below the list, a 'New Contact' form is open, with a red circle and the number '2' highlighting it. The form includes fields for External ID, Email, Home Street, Postal, Business Name, Business Street, Postal, Business Timezone (set to Phoenix (-7:00)), Phone (Office), Fax, Primary Phone (SMS-Enabled), Preferred Agent, and Default Group. There are also fields for First Name, Last Name, Display Name/Nickname, and Salutation. A 'No tags' section with an '+ Add' button is also visible. The form has 'Cancel' and 'Save' buttons at the bottom right.

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 MyCloud Messenger, and click Import

*You can import tags by adding a tags column. Multiple tags should be separated by a pipe bar “|” typically located above the Enter key

Contact Bulk Import

You can upload a CSV of your contacts for a quick start. Use the template provided to organize & gather your data.

We will attempt to find existing contacts by phone number or email address, but please be aware that doing an import more than once can easily produce duplicates.

***To import tags:** Enter any number of tags in a single column; separate multiple tags with the “bar” or “pipe” character: | To remove tags from an existing contact (untag): Enter any number of tags in a single column, separated as the Tags, then select “Untag” for that column.

Import Steps: Queued, Processing, Saving, Tagging, Untagging, Completed

NOTE: This feature expects to be served a UTF-8 encoded CSV. Other formats may process, but will likely have errors.

SUPPORTED FIELDS

- First Name
- Last Name
- Company Name
- Display Name
- Primary Phone Number
- Email Address
- Home Street Address
- Home Postal
- Group
- Tags*
- Untag
- Any Custom Contact Field

UPLOAD CSV FILE

Choose File Reinvent - IT N...11-22-2021.csv

12.2 kB

- ignore -	First	Last N:	- ignore/discard -	- ignore	- ignore/discard -	- ignore	- ignore	- ignore	- ignore	- ignore	- ignore	- ignore	- ignore	- ignore	- ignore	- ignore	- ignore	- ignore
Lead Type	First Name	Last Name	Email	Company	Country	Work Street Address	Work Address 2	Work City	Work State / Province	Work Zip / Postal Code	Unmatched Scanned Badge Text	2. Notes	4. Is there a business need?					
LeadCapture	Noah	Grife	noah.grife@kennected.io	Kennected LLC	USA	201 S Capitol Ave		Indianapolis	Indiana	46225		No answer provided	No answer provided					
LeadCapture	Tobias	Levi	tobias@myitcrewmy.com	My IT Crew	USA	544 Park Avenue	Suite 331	Brooklyn	New York	11205		No answer provided	No answer provided					
LeadCapture	Michael	Boback	mboback@singlepointglobal.com	SinglePoint Global	USA	21720 Red Rum Drive, STE 122		Ashburn	Virginia	20147		Astris	No answer provided					
LeadCapture	Jason	Hahn	jhahn@comsoltx.com	Computer Solutions	USA	14410 Wurzbach Parkway Suite 175		San Antonio	Texas	78216		No answer provided	No answer provided					
LeadCapture	Carl	Goodfriend	carlg@provinet.com	ProviNET Solutions	CIO	7084682000	USA	18645 West Creek Drive	Tinley Park	Illinois	60477		No answer provided	No answer provided				

... plus more [42 total] (max 5 rows shown)

Please review the information and select what columns will be imported as what data. It is of the utmost importance that you select the fields correctly. Any mismatch will create contacts with bad and misplaced data. This is especially true of the Primary Phone Number field, as this is used to identify existing records and is integral to the system. Please also be sure to indicate if your file contains a header row.

Note: if importing a subsequent list, MyCloud Messenger will scrub the file for duplicate phone numbers and emails addresses. As with any import, be mindful as duplicates can still happen.

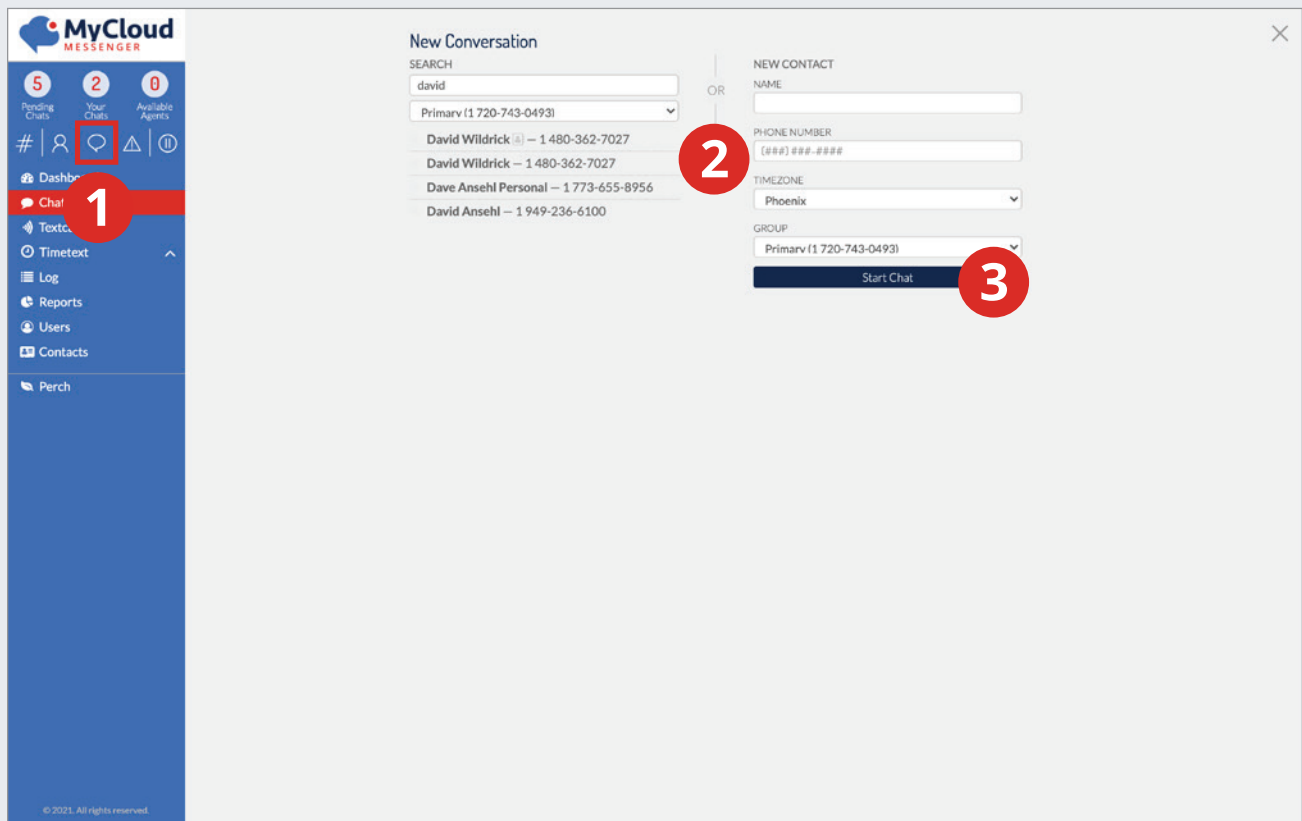
Sending Messages

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. MyCloud Messenger has you covered for every scenario.

Single contact

Sending a single message:

1. Select the New Message button at the top of the left-hand menu
2. Search for a contact or enter new contact information and choose the number to send from
3. Click Start Chat



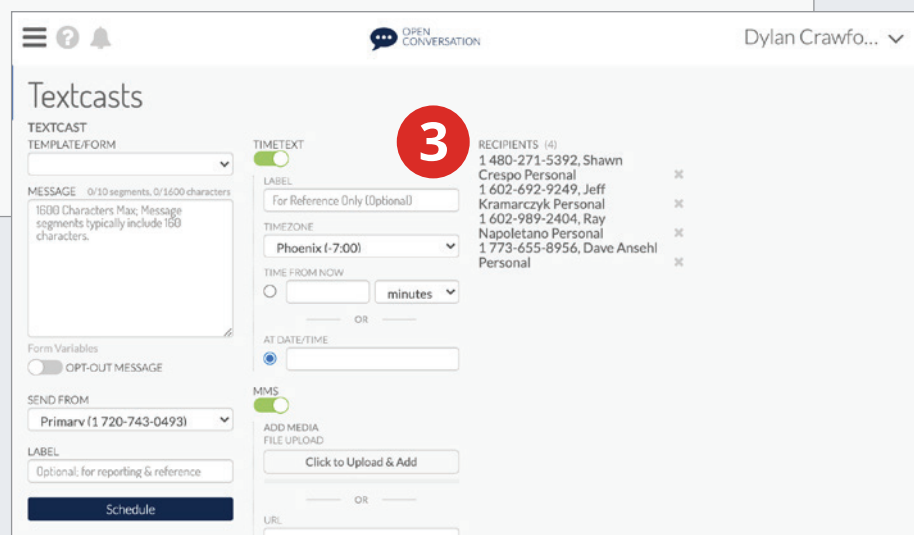
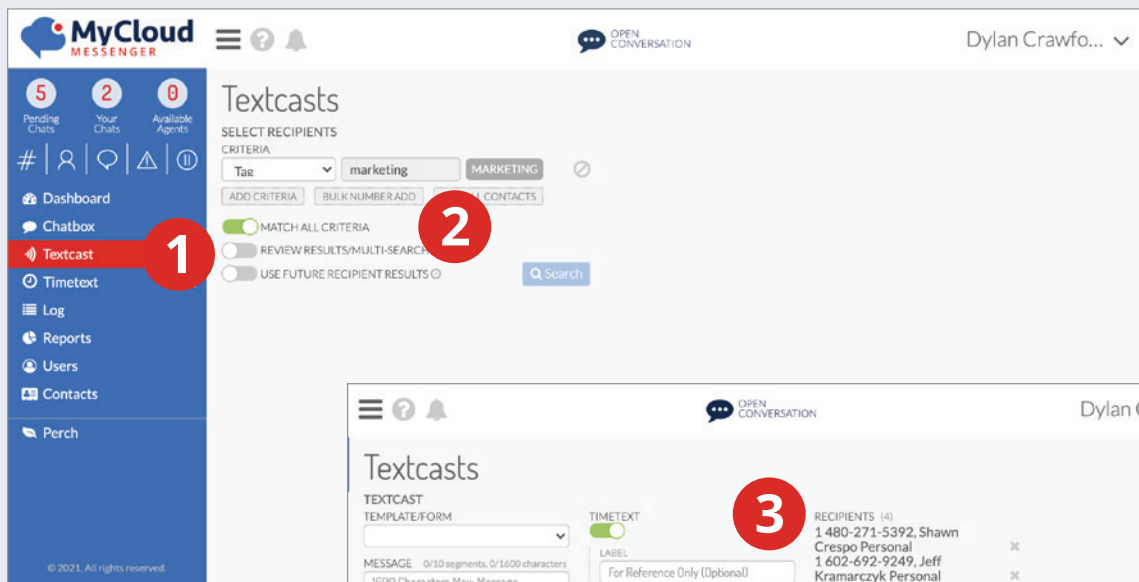
A new chat window will pop up where you can send and receive messages with your contact.

Many contacts - Textcast

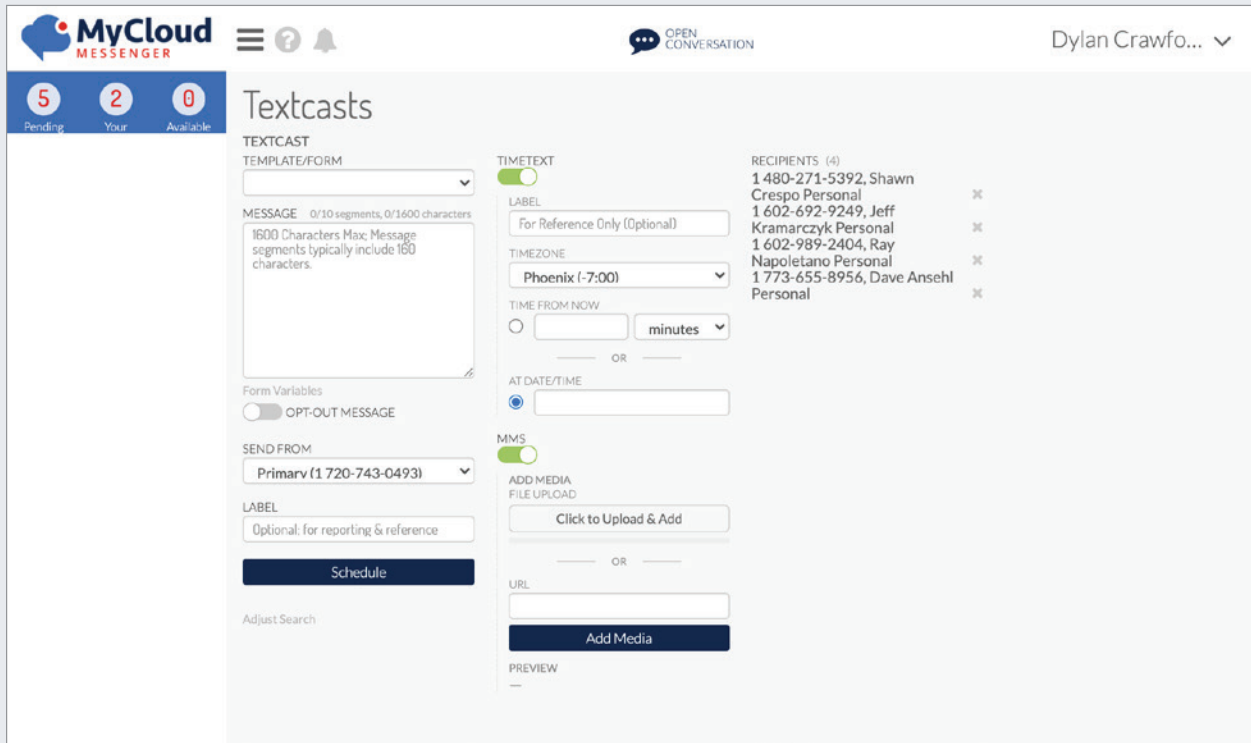
You can send a message to your contact list or to only those contacts that match certain criteria in just a few easy steps. This allows you to effectively market new products, upcoming promotions, or provide relevant business notifications.

To send a Textcast:

1. Select Textcast from the left-hand menu
2. Select the criteria your contacts should match (most commonly tags)
3. Select Search to populate the list of recipients
4. Enter the message you would like to send and click Send
 - *The toggle to match all criteria will either expand your results or allow you to target a smaller audience.



To personalize your message, click Form Variables below the message box. This will allow you to inject the contact's name or other contact details into the message. If you would like to schedule the message to be sent later, simply click the Timetext toggle and select when you would like the message to be sent.



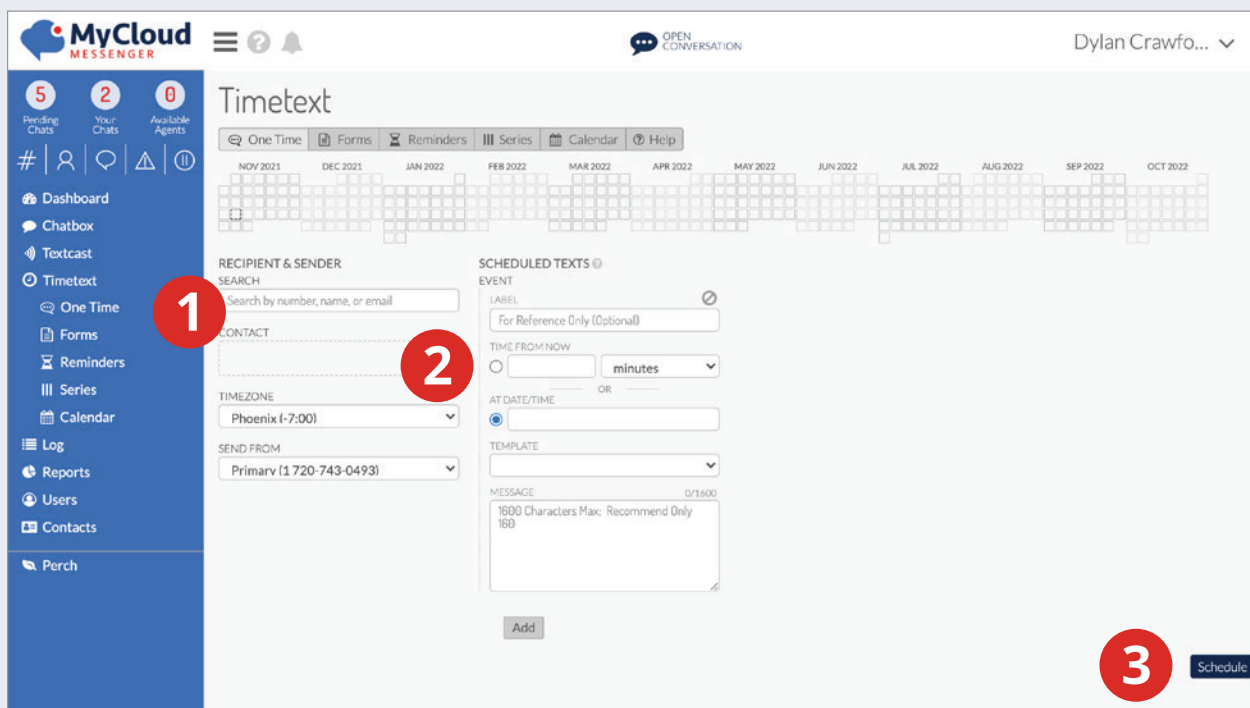
Timetext

MyCloud Messenger allows you to automate many of your workflows from basic scheduling to automating text campaigns or intelligent text reminders.

Scheduled

To create a scheduled text:

1. Select One Time under Timetext in the left-hand menu
2. Search for the contact you would like to send to, select when you would like the text to be sent, and craft your message
3. Click Schedule



Note: you can schedule multiple messages to the same recipient simply by adding an event before clicking the Schedule button.

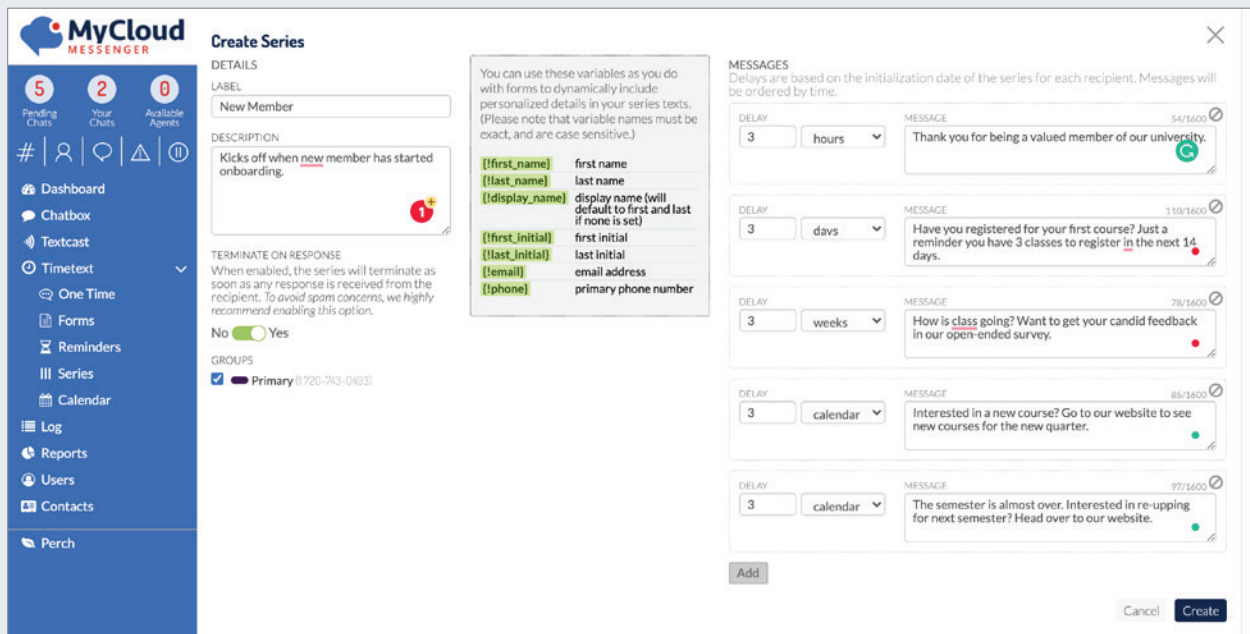
Series

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

First, you'll want to create a series which can be found under the Admin Menu located in the upper right-hand corner and select Create Series.

Creating a new Series:

1. Give it a name
2. Provide a brief description
3. Add your messages
 - *Each message should be assigned a delay which determines when the message will be sent in relation to when a recipient was subscribed to the Series.



Note: you can also personalize each message by selecting from the variables list to inject things like the contact's first name.

Subscribing contacts:

1. Select Series under the Timetext menu in the left-hand menu
2. Search for contacts matching your desired criteria
3. Choose the series, and click Send
 - *contacts can also be automatically subscribed through a Keyword operation.

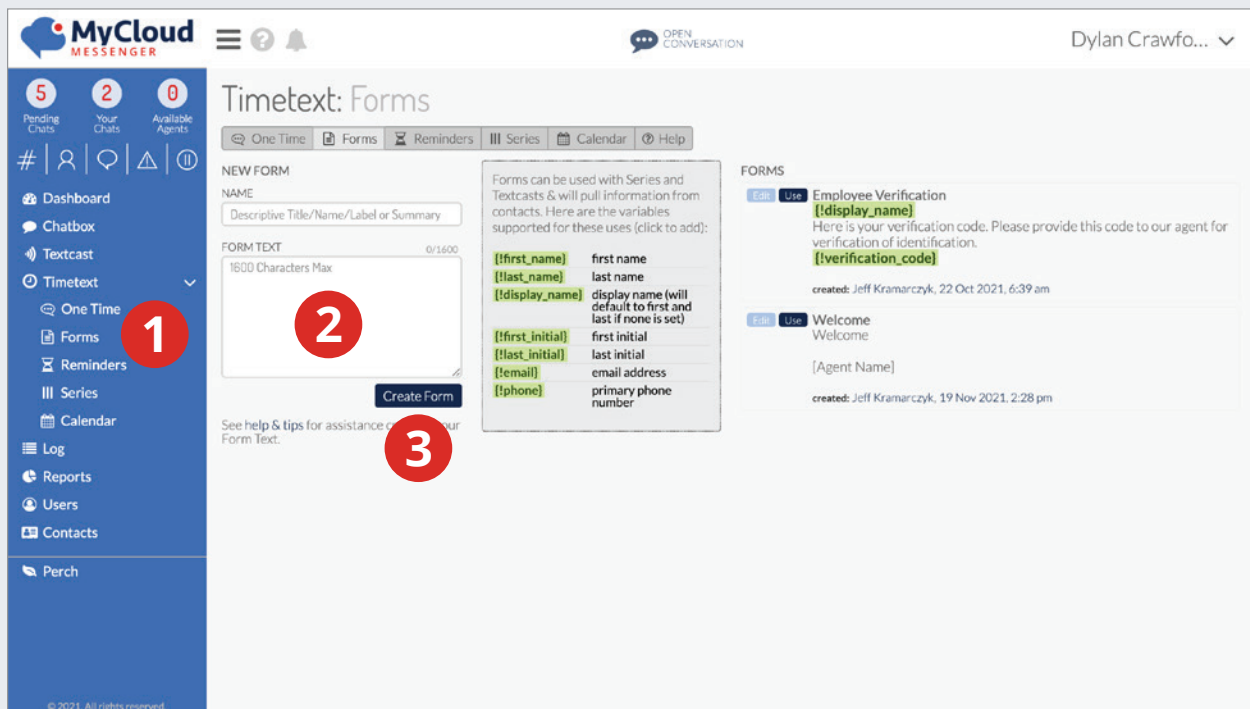
Reminders

Reminders can be used to send a text notification prior to an upcoming appointment, bill due date, or scheduled delivery date. This can help assure things like on-time payments and accurate appointment schedules.

To schedule automated reminders you must first create a form. Think of a form as the body of the reminder, where you can add placeholders for variables like date, time, location, and more.

To create a new form:

1. Select Forms under Timetext in the left-hand menu
2. Give the form a name and craft its messaging
3. Click Create Form

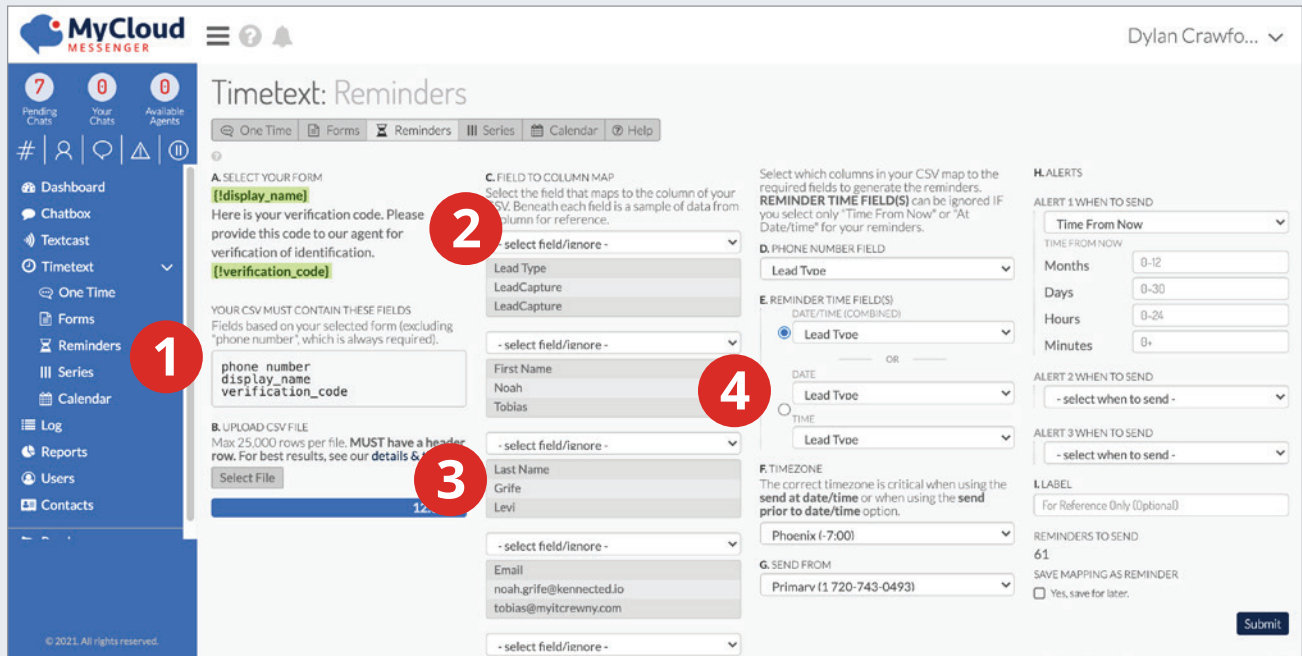


The screenshot displays the MyCloud Messenger interface for creating a new form. On the left, a navigation menu shows 'Forms' selected under the 'Timetext' category, with a red circle '1' highlighting this selection. The main workspace is titled 'Timetext: Forms' and contains a 'NEW FORM' section. This section has a 'NAME' field with a placeholder 'Descriptive Title/Name/Label or Summary' and a 'FORM TEXT' field with a '1600 Characters Max' limit. A red circle '2' highlights the 'FORM TEXT' field. Below the 'FORM TEXT' field is a 'Create Form' button, with a red circle '3' highlighting it. A pop-up window titled 'Forms can be used with Series and Textcasts...' lists variables: {first_name} (first name), {last_name} (last name), {display_name} (display name), {first_initial} (first initial), {last_initial} (last initial), {email} (email address), and {phone} (primary phone number). On the right side, a 'FORMS' list shows existing forms: 'Employee Verification' (created 22 Oct 2021, 6:39 am) and 'Welcome' (created 19 Nov 2021, 2:28 pm).

Note: almost any variable field can be added by inserting `{!field_name}` into the message. These variables must exist in the file used for import in the next step.

To schedule your reminders:

1. Select Reminders
2. Choose the form
3. Upload the .csv file containing the reminder information
4. Map the fields and choose when to schedule each message
5. Click Submit



1 Select Reminders

2 Choose the form

3 Upload the .csv file containing the reminder information

4 Map the fields and choose when to schedule each message

5 Click Submit

Calendar

Once you have scheduled messages to be sent out using any of the above options, you will be able to view, edit, or abort by viewing the calendar. Here, you will see how many of each type are scheduled on any given day. Clicking on one will allow you to view and modify if needed.

Groups and Pathways

In MyCloud Messenger, 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.

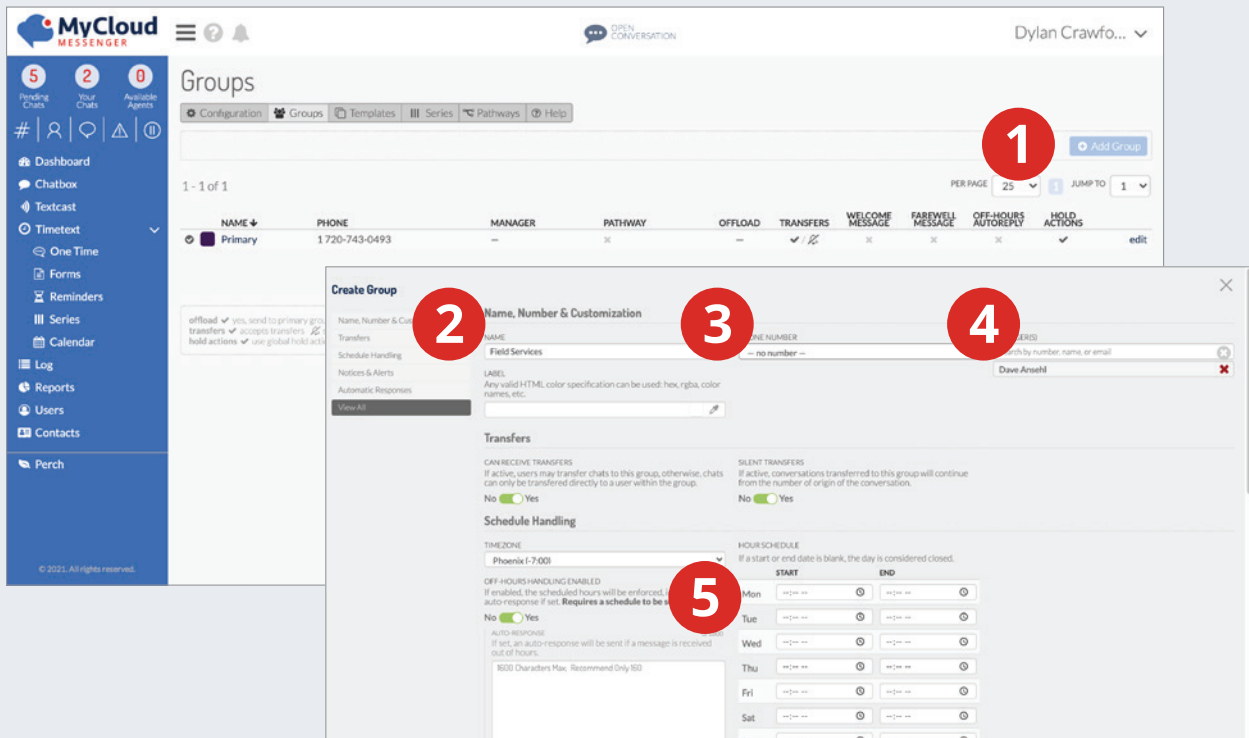
Groups

Your MyCloud Messenger account has a single, pre-built primary group. This allows you to send and receive messages from day one. You can add groups based on things like department, topic, or campaign.

First navigate to Groups under the Admin Menu in the upper right-hand menu.

To add a group:

1. Click 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).

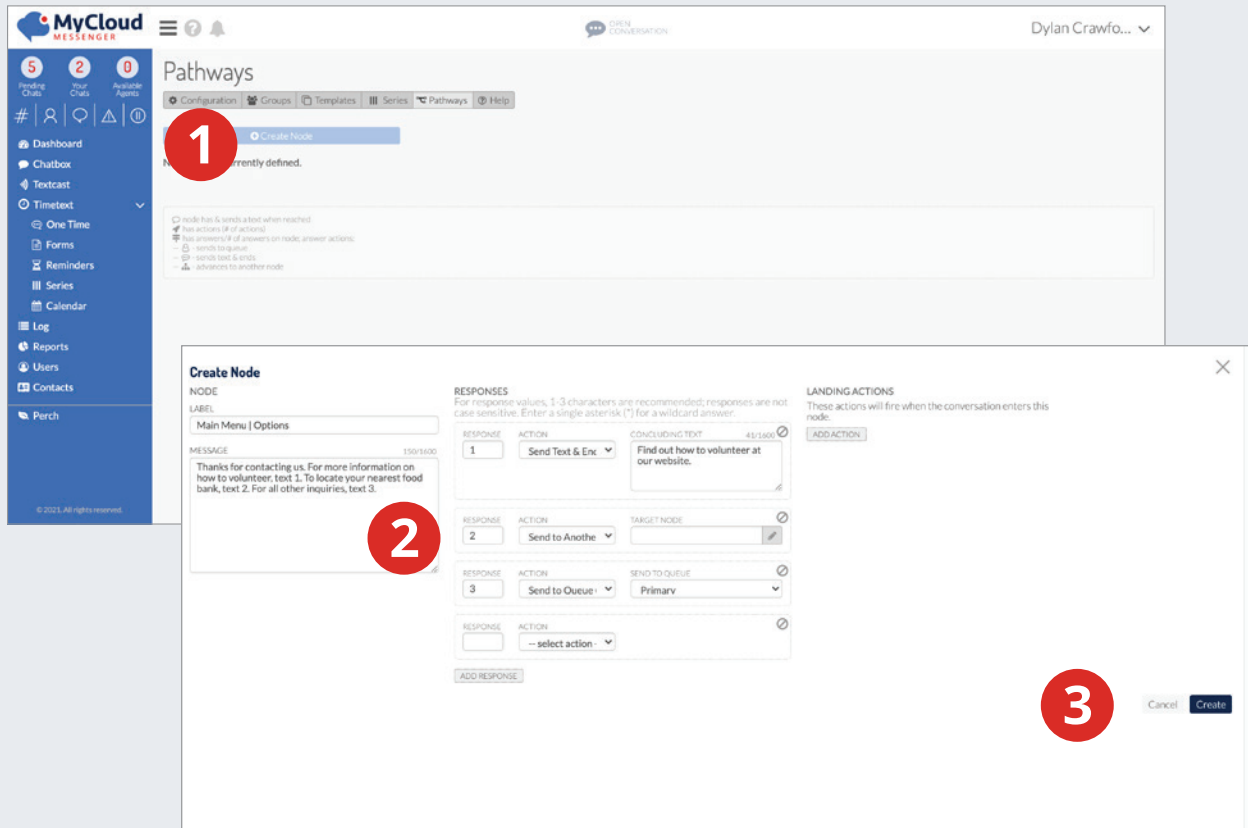
Pathways

Pathways within MyCloud Messenger allow you to automate inbound text interactions. This allows you to effectively provide information, queue chats up for a live agent, or simply terminate the interaction with a message.

You will build your pathway by creating nodes. Each pathway must contain at least one. First, choose Pathways from the Admin Menu in the upper right-hand corner.

To add a node:

1. Click Create Node
2. Enter a name, automated message, and add the acceptable responses/actions for each
3. Click Save



The screenshot displays the MyCloud Messenger interface. On the left is a navigation sidebar with icons for Dashboard, Chatbox, Textcast, Timetext, One Time, Forms, Reminders, Series, Calendar, Log, Reports, Users, and Contacts. The main content area is titled 'Pathways' and includes a 'Create Node' button, which is circled in red with the number '1'. Below this, a 'Create Node' modal window is open. It has three main sections: 'NODE LABEL' with a text input field containing 'Main Menu | Options'; 'MESSAGE' with a text area containing 'Thanks for contacting us. For more information on how to volunteer, text 1. To locate your nearest food bank, text 2. For all other inquiries, text 3.'; and 'RESPONSES' with a table of response-action pairs. The first row has '1' in the response field and 'Send Text & Enc' in the action field, with a 'CONCLUDING TEXT' field containing 'Find out how to volunteer at our website.'. The second row has '2' and 'Send to Another'. The third row has '3' and 'Send to Queue'. There are also 'LANDING ACTIONS' and 'ADD RESPONSE' buttons. A red circle with the number '2' is over the message text area, and a red circle with the number '3' is over the 'Create' button at the bottom right of the modal.

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 MyCloud Messenger account allows you to create an unlimited number of keywords; each configured to perform an action or set of actions when texted. Keyword management can be found under the Admin menu in the upper right-hand corner.

Building Operations

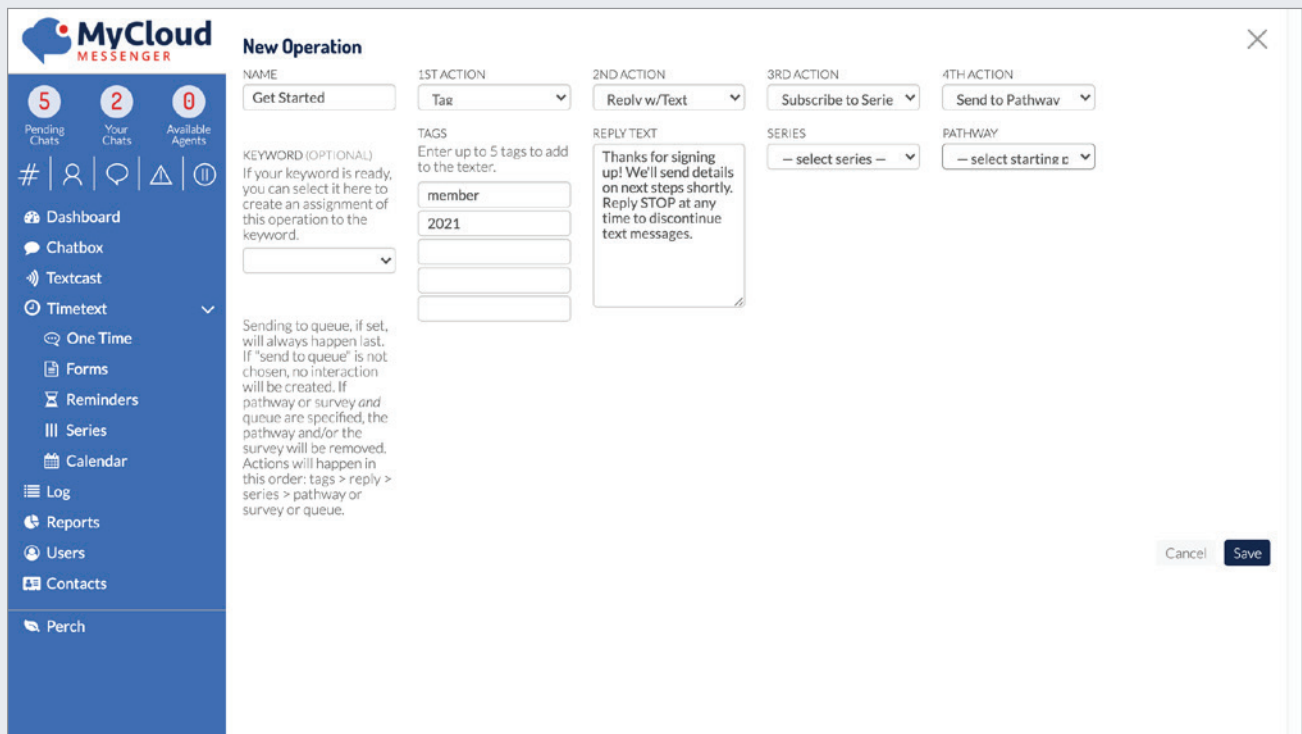
First, you will want to build an operation which is an action or multiple actions set to happen when a keyword is texted. These actions can be:

- **Tag** - this will tag a contact with up to 5 preset tags automatically
- **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 specified drip campaign
- **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

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.



New Operation

NAME:

1ST ACTION:

2ND ACTION:

3RD ACTION:

4TH ACTION:

KEYWORD (OPTIONAL):

TAGS: Enter up to 5 tags to add to the texter.

REPLY TEXT:

SERIES:

PATHWAY:

Cancel Save

Note: 'send to queue', 'send to pathway', and 'initiate survey' actions cannot be combined in the same operation.

If you have already established a keyword, you can easily select it directly from the operation. When you're all set, click Save.

Keyword Assignment

To add a Keyword, enter it into the field at the top of the keyword screen and click Add Keyword. Then, under Assignments, click Add Assignment, match it up to the desired Operation, and click Save.

Note: you can have multiple keywords assigned to the same operation.

Settings

As an admin user, you can easily configure your account or group settings by navigating to the admin menu in the upper right-hand menu and choosing settings or groups respectively. Let's take a quick look at a few important settings.

Adding your logo

Under account settings, you can easily add your logo to instantly make your instance feel more personal. To do this, under Branding & Customization select a logo file under from your desktop and click Save. Your logo will appear on your custom login page as well as in the top left corner within the MyCloud Messenger application. You can also modify the left navigation bar color.

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.

Text consent

Inbound text consent allows you to establish an opt-in workflow where new contacts can agree to receive messages from your company. It adds a layer of compliance and protection to those who need it.

You can configure a global text consent policy and workflow within your account settings and customize messaging within each group if you have multiple campaigns active. You can also configure certain groups to be exempt from the global text consent configuration. To set it up, simply toggle it on, click 'Populate for Me' adjust messaging to your liking and click Save.