Text Messenger Release Notes

An internal-only product communication to help you support our client's understanding of the changes in this release.

For this release we are updating the following app:
Messenger v6.21.0

Product Release Date: April 23, 2024, available upon login April 24, 2024
Document Last Modified Date: April 23, 2024

Quick summary for our upcoming release

For this version, we are releasing 4 new features and enhancements and 2 backend items. The new items are listed below as quick links so that you can view the topics that are most important to you first.

1 Branding Update in Text Messenger

2 Sales Appointment Management

- Confirm or Cancel

- Reschedule

- Vehicle Sold notification

3 Administrative Options for Appointment Confirmation

- Appointment Confirmation setup

- Missed Appointment Notifications setup

- Sold Vehicle Appointment Notifications setup

New Features and Enhancements

Text Messaging Client

1. Branding Update in Text Messenger

The header in Messenger updated from "Elead Text" to "CRM Text".

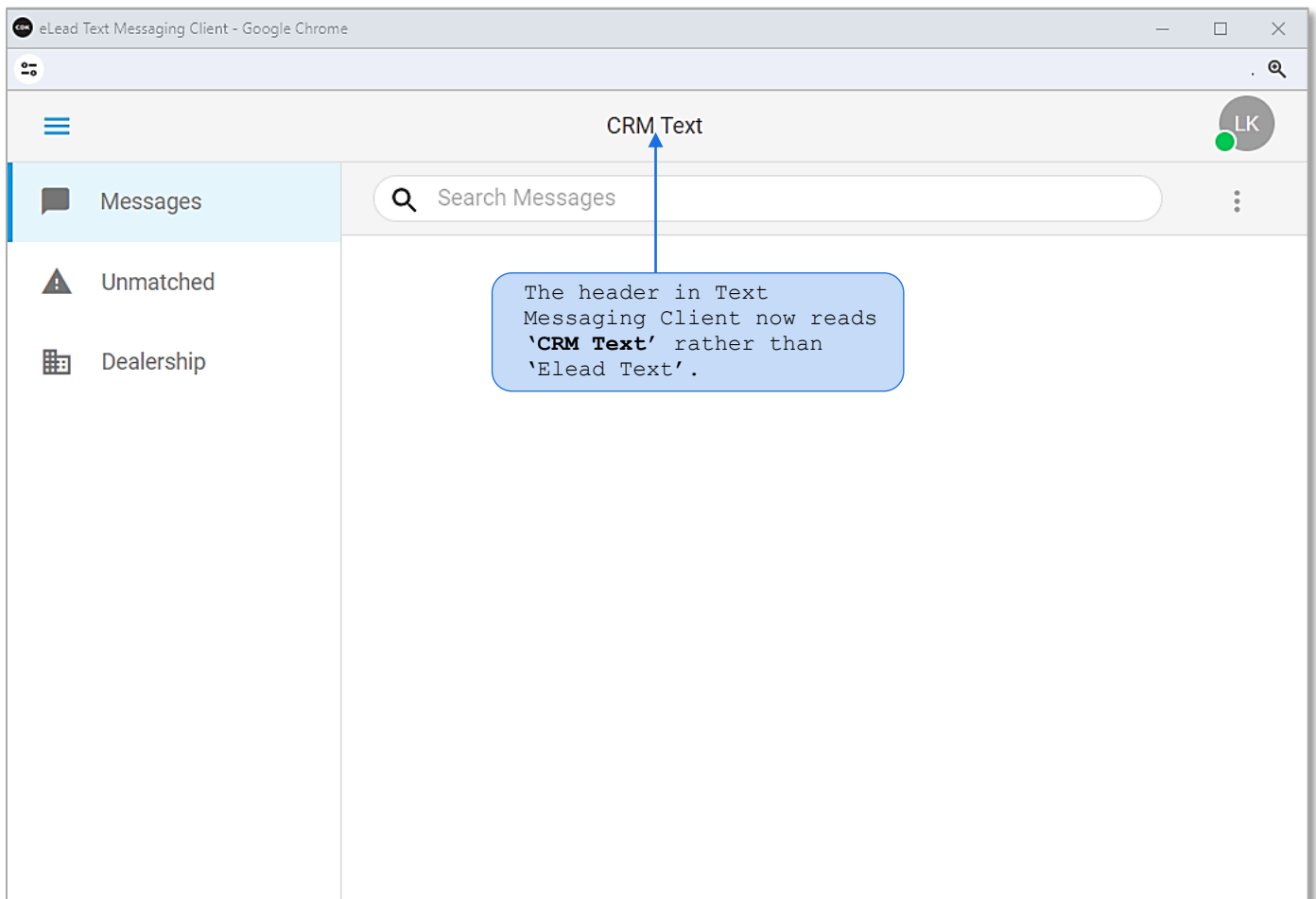Figure 1: Text Messaging Client

Text Messenger

2. Sales Appointment Management

Customers with upcoming Sales appointments can now receive automated text reminders with an added reschedule option for enhanced flexibility.

When a customer has a sales appointment scheduled, automatic text notifications are sent to the customer at the following intervals:

- **Day Before Reminder:** Customers receive a reminder at approximately 5:00 p.m. on the day before the appointment asking for confirmation of the appointment.

- **Next Day Reminder**: If there is no response to the reminder, they will receive another reminder at approximately 9:00 a.m. on the following day requesting confirmation.

- **Final Reminder:** If still no response, customers receive a final reminder approximately 1.5 hours before the appointment with the same confirmation, cancel or reschedule options.

Note: The timing of notifications may vary slightly, typically within a range of +/- 15 minutes for each notification.

EXAMPLE: VIEW FROM SALES PERSPECTIVE

Figure 2: View from Sales Perspective

Confirm or Cancel

The appointment reminder provided to the customer offers text options for Confirm or Cancel, facilitating easy scheduling.

Customers simply text **"C"** to confirm their appointment on the specified date and time. In addition, the text empowers them to text **"X"** to cancel or click the link to reschedule, providing a more adaptable and user-friendly approach to Sales Appointment Management.
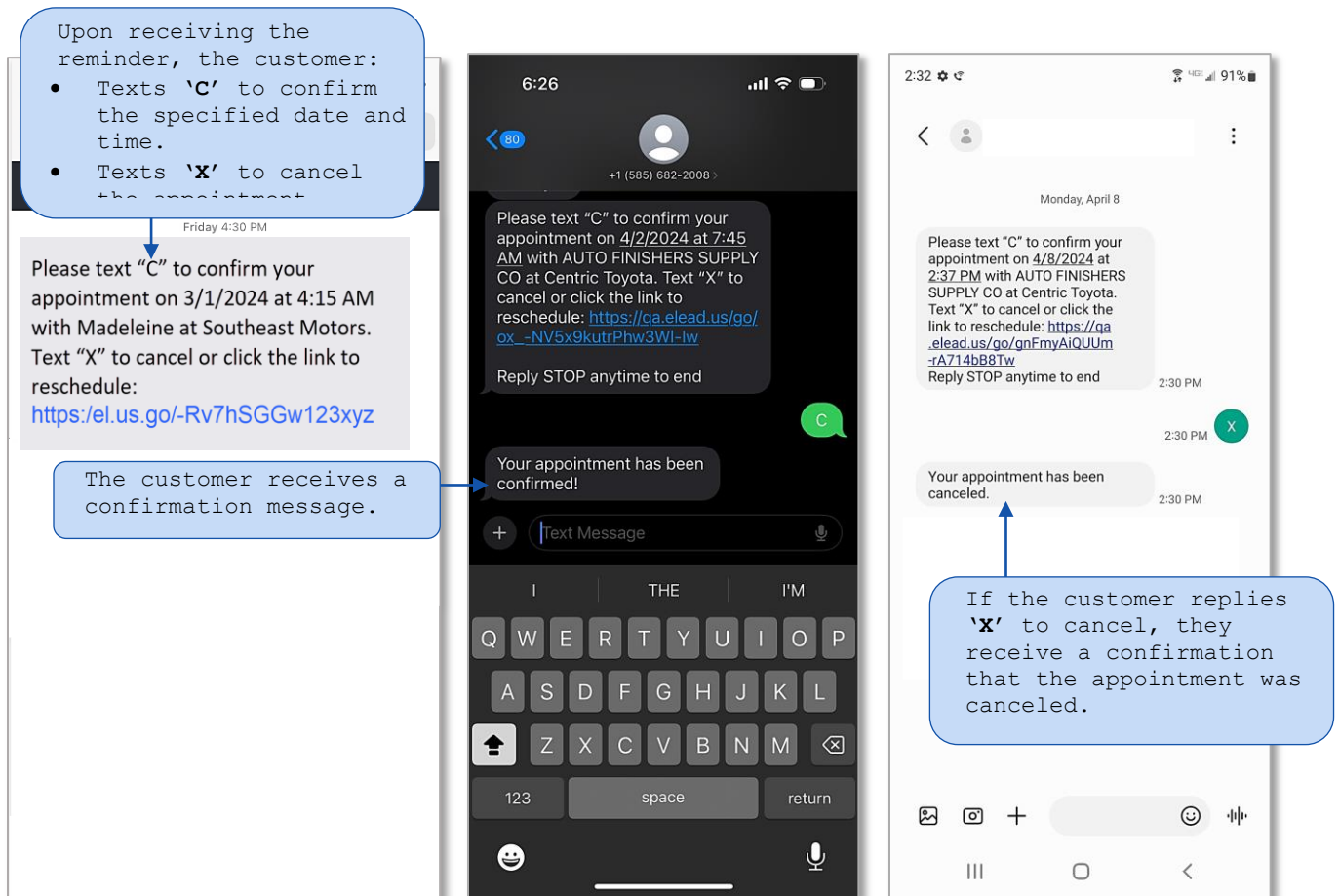

Figure 3: Sales Appointment Confirmation

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- **Final Reminder:** If still no response, customers receive a final reminder approximately 1.5 hours before the appointment with the same confirmation, cancel or reschedule options.

Note: The timing of notifications may vary slightly, typically within a range of +/- 15 minutes for each notification.

Reschedule

Customers can press the link to reschedule the sales appointment, providing a more adaptable and user-friendly approach to Sales Appointment Management.
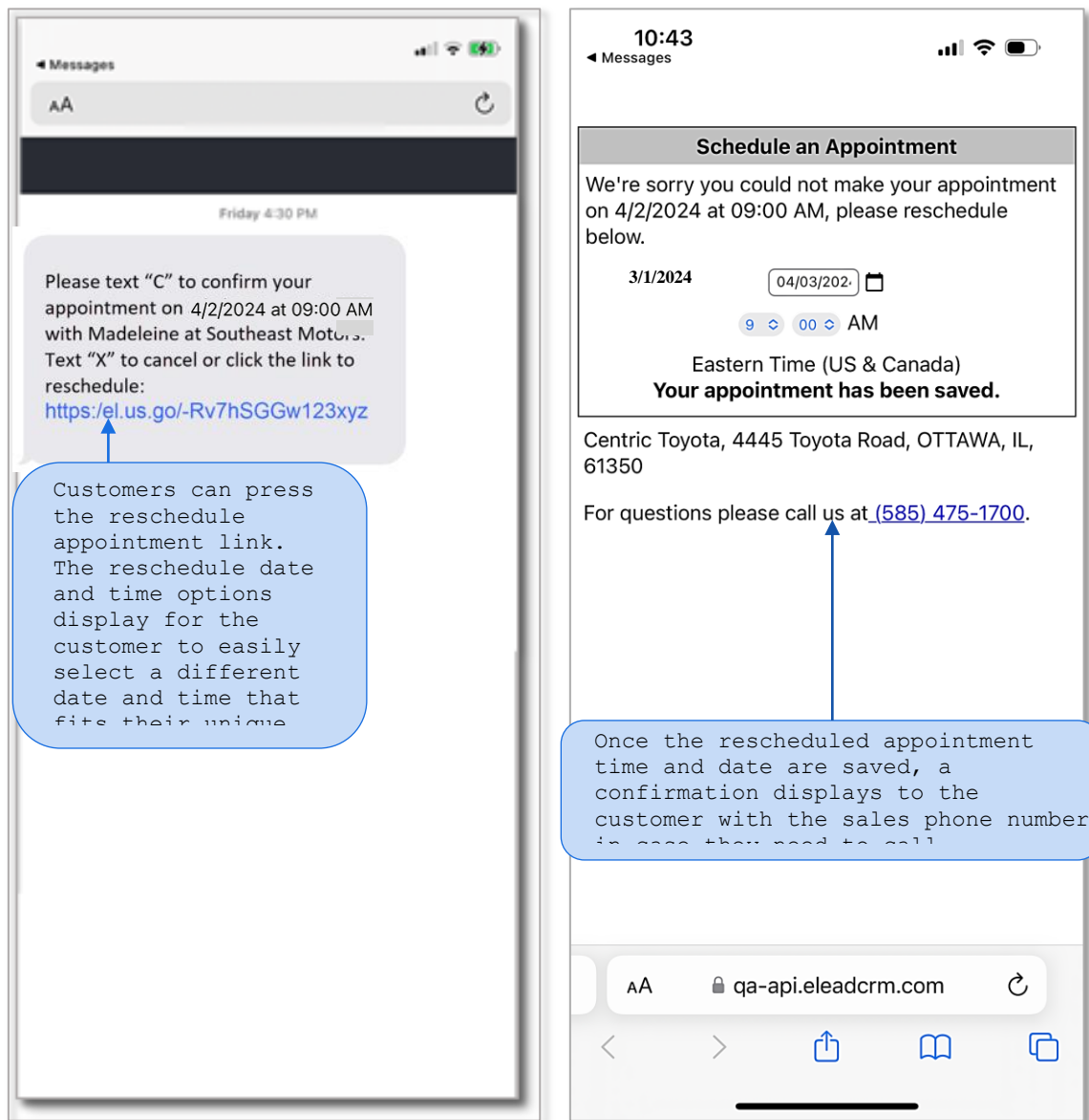

Figure 4: Reschedule Sales Appointment

Vehicle Sold notification

If a customer's vehicle of interest is sold before their confirmed sales appointment, the customer receives a text notification to contact the dealership.

This notification is initiated when the vehicle's Sales Status is marked 'Sold' on the Opportunity Details, indicating that a customer has purchased the vehicle. Here's how it works:

1. **Sales Status Updated:** The dealership updates the Sales Status dropdown list to 'Sold' in the Opportunity Details when the vehicle is sold to another customer.

2. **Notification Sent:** Once the Sales Status is updated, the customer who had scheduled the appointment to see that same vehicle receives a text message with a phone link to contact the dealership. This notification alerts them that there is new information regarding their vehicle of interest.

Figure 5: Vehicle Sold Notification

or

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Text Messenger

3. Administrative Options for Appointment Confirmation

These features are accessible to all dealers using Text Messenger and require manager permissions. Dealers can now control notifications by an ON/OFF toggle and customer opt-in requirement if wanted.

> **Notes about Require Opt-In for Appointment Notification:**
>
> - When 'Require Opt-In' is enabled, the system verifies that the customer has previously opted in to receiving text messages before sending Appointment Confirmations.
> - If 'Require Opt-In' is disabled, Appointment Confirmations will be sent to any customer who has not previously opted out of receiving text messages.
> - Customer's response of 'C' OR 'X' automatically opts the customer in and resolves the status of customers who were already in a pending state prior to the notification being sent.

To access this feature from the CRM menu: Navigate to **Admin > CRM Setup > Opportunity Management > Text Messaging Administration.**
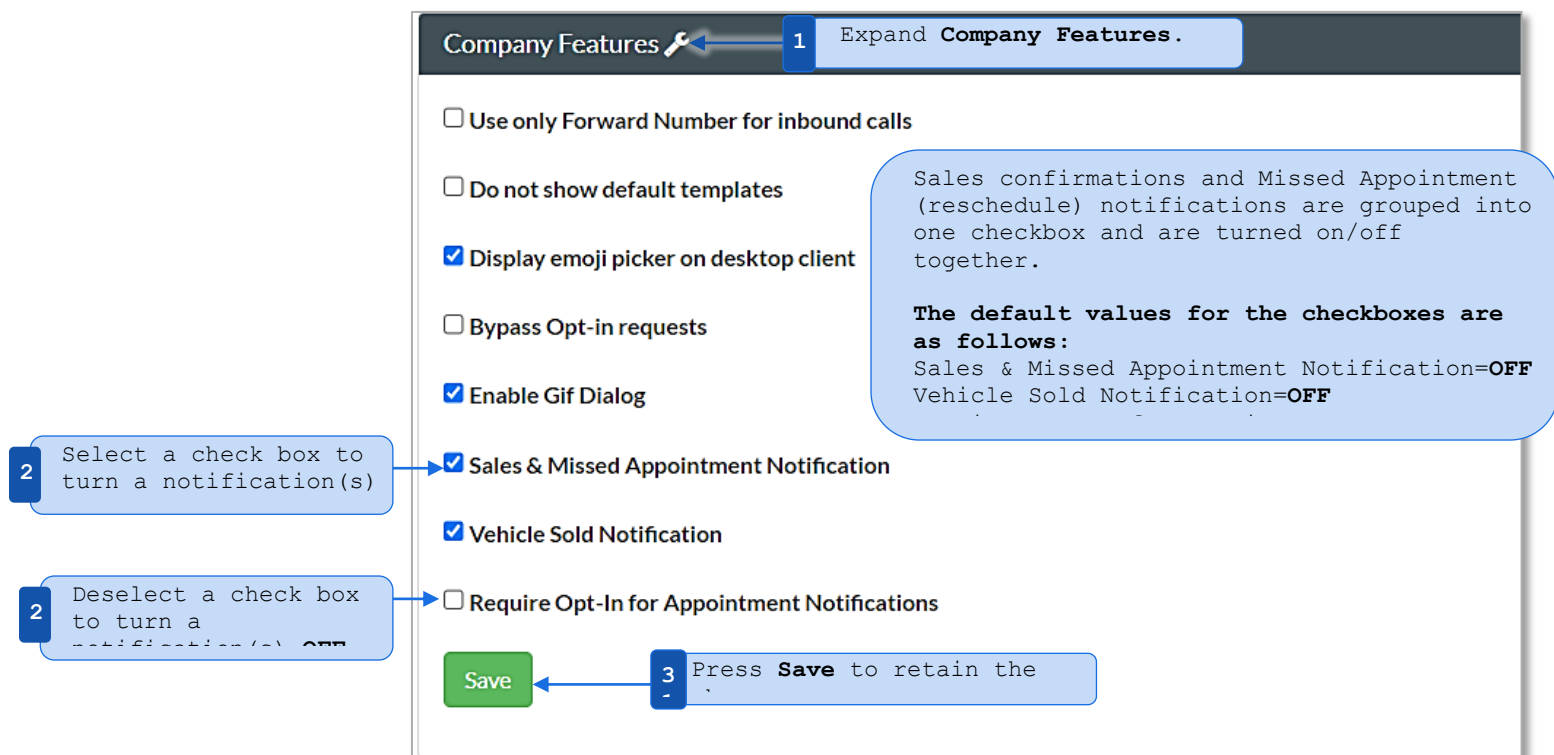
Company Features

1 Expand **Company Features**.

- ☐ Use only Forward Number for inbound calls
- ☐ Do not show default templates
- ☑ Display emoji picker on desktop client
- ☐ Bypass Opt-in requests
- ☑ Enable Gif Dialog
- ☑ Sales & Missed Appointment Notification
- ☑ Vehicle Sold Notification
- ☐ Require Opt-In for Appointment Notifications

Sales confirmations and Missed Appointment (reschedule) notifications are grouped into one checkbox and are turned on/off together.

The default values for the checkboxes are as follows:
Sales & Missed Appointment Notification=**OFF**
Vehicle Sold Notification=**OFF**

2 Select a check box to turn a notification(s)

2 Deselect a check box to turn a notification(s) OFF

Save

3 Press **Save** to retain the `

Figure 6: Administrative Options for Appointment Confirmation

> Note: After turning a notification on or off, allow at least one hour for background processing to run and the new settings to take effect.

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Administrative Options for Appointment Confirmation cont'd

Use an existing Appointment Confirmation template or create a new template.

Appointment Confirmation setup

You can use the default Appointment Confirmation template as is or customize it as needed. This page shows the simple steps to make the default template as Active.

Figure 7: Template Type and Template

Note: The system automatically uses the **Active** template for each message type. Deactivate any other templates that are not in use so that there is only one template per Template Type for the system to identify and automatically send.

Administrative Options for Appointment Confirmation cont'd

Appointment Confirmation setup cont'd

When creating a new template or customizing and existing template, make sure you include the commands recognized by the system and use the Template Tags to insert customer names, salesperson names, dates, times, addresses, etc. Use the additional steps to create your own or customize an existing template.

Figure 8: New or Existing Appointment Confirmation Template

Note: The system automatically uses the **Active** template for each message type. Deactivate any other templates that are not in use so that there is only one template per Template Type for the system to identify and automatically send.

Administrative Options for Appointment Confirmation cont'd

Missed Appointment Notifications setup

Create a new, or customize an existing, template for Missed Appointment Notifications.

Text Message Template Editor

Template Type:
Missed Appointment

> **1** Expand the Template Type dropdown and select **Missed Appointment.**

Selected Template:
New

Active: ☑

> **5** Mark this template as **Active** with a checkmark.

> **2** Expand the **Select Template** dropdown and select an existing default template or create a New one.

Name:
Missed Sales Appointment Template

> **3** If **New** is selected, give the new template a **Name.**

Message:

Template Tags: Dealership Address [Insert]

Hello <{TitleCase}><{CustFirstName}></{TitleCase}>, you have missed your appointment on <{NextSalesApptDate}><{NextSalesApptTime}> with <{TitleCase}> <{SalesPersonFirstName}></{TitleCase}>. We would still like to show you how you can trade-in your <(CurrentVehicleYear)><(CurrentVehicleMake)><(CurrentVehicleModel)> and drive home in a new <{SuggestedVehicleYear}><{SuggestedVehicleMake}><{SuggestedVehicleModel}>. Please reschedule your appointment using the link below or call us at <{DealershipPhone}>. We are located at <{DealershipAddress}>.|<{SalesApptSchLink}>

Dropdown options: ...ht Vehicle Id / ...onId / Dealer Inventory Vehicle Id / Dealer Vendor Id / Email Opt In / Sales Appointment Schedule Link / Appraisal Appt Date / Appraisal Appt Time / Credit App Link / Suggested Vehicle Year / Suggested Vehicle Make / Suggested Vehicle Model / Suggested Vehicle Trim / Suggested Vehicle Stock / Suggested Vehicle VIN / Suggested Vehicle Price / Suggested Vehicle Loan Payment / Suggested Vehicle Loan Cash Down / Suggested Vehicle Loan Term / Suggested Vehicle Lease Payment

32/600

[Save]

> **6** Press **Save.**

> **4** If **New** is selected, enter the message text and **Template Tags** for the customized message. NOTE: Press **Insert** once a Template Tag is selected to place it into the message.

Figure 9: Missed Appointment Template

Note: The system automatically uses the **Active** template for each message type. Deactivate any other templates that are not in use so that there is only one template per Template Type for the system to identify and automatically send.

Administrative Options for Appointment Confirmation cont'd

Sold Vehicle Appointment Notifications setup

You can use the default Sold Vehicle Appointment Notification template as is or create a new one. This page shows the simple steps where the default template is Active.

Text Message Template Editor

Template Type:
Sold Vehicle Appointment Notification

1 - Expand the Template Type dropdown and select **Sold Vehicle Appointment Notification**.

Selected Template:
Sold Vehicle Appointment Notification

Active: ☑

5 - Mark this template as **Active** with a checkmark if a new template was

2 - Expand the **Select Template** dropdown and select an existing default template or create a New one.

Name:
Sold Vehicle Appointment Notification

3 - If **New** is selected, give the new template a

Message: **Template Tags:** Free Text   Insert

We have new information regarding your appointment for the <{SoughtVehicle}>. Please contact us ASAP at <{dealerPhoneNumber}>

Suggested Vehicle Year
Suggested Vehicle Make
Suggested Vehicle Model
Suggested Vehicle Trim
Suggested Vehicle Stock
Suggested Vehicle VIN
Suggested Vehicle Price
Suggested Vehicle Loan Payment
Suggested Vehicle Loan Cash Down
Suggested Vehicle Loan Term
Suggested Vehicle Lease Payment

Save

6 - Press **Save**

4 - If **New** is selected, enter the message text and **Template Tags** for the customized message. NOTE: Press **Insert** once a Template Tag is selected to place it into the message.

Figure 10: Sold Vehicle Notifications

Note: The system automatically uses the **Active** template for each message type. If creating a new Sold Vehicle Appointment Notification template, mark it Active. This **overrides** the current static default template that is marked Active (even though the Active element cannot be unchecked on the default template).

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Backend items for release

This internal-only section lists the backend items for this release. Backend items are necessary to the function of the application and are often developed over time. Backend items are not visible in the application interface.

	Description	Jira Number
1	French - Localize of responses to Appt confirmation	ELCOMT-4571
2	French - Customer facing - unmatched messages	ELCOMT-4631

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