

# SimplyChat

Texting module which allows users to chat internally or text with external parties using SMS

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# Overview & Usage

## Overview

The SimplyChat module allows you to send SMS text messages to phone numbers with SMS capabilities. A user must be assigned to a chat group, or a SMS DID assigned to them.

To start an SMS chat, log into the Client Web Portal (<https://cwp.thinksimplicity.com>). Once logged in click on **SimplyChat** on the left hand menu. Then choose **Chat**. You will be greeted with a screen with a text field similar to a chatroom or SMS phone-app screen.

## SimplyChat Limitations

- 1000 character limit when creating messages in chat window

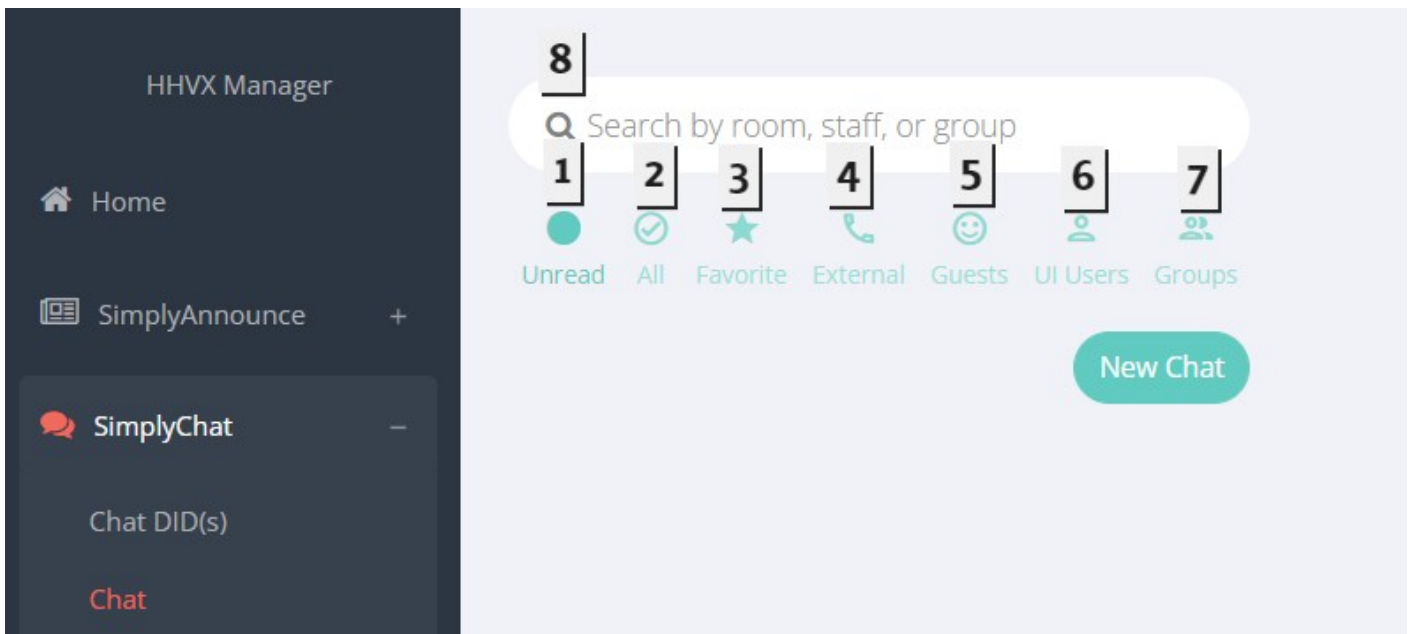
## Terms:

- **DID:** Direct Inward Dialing - A term meaning, for simplicity's sake, a **telephone number**. For example, a DID of 406-555-5555 would be a DID (direct inward dialing) for a cell phone, business, desk phone, etc.

## Types of Conversations

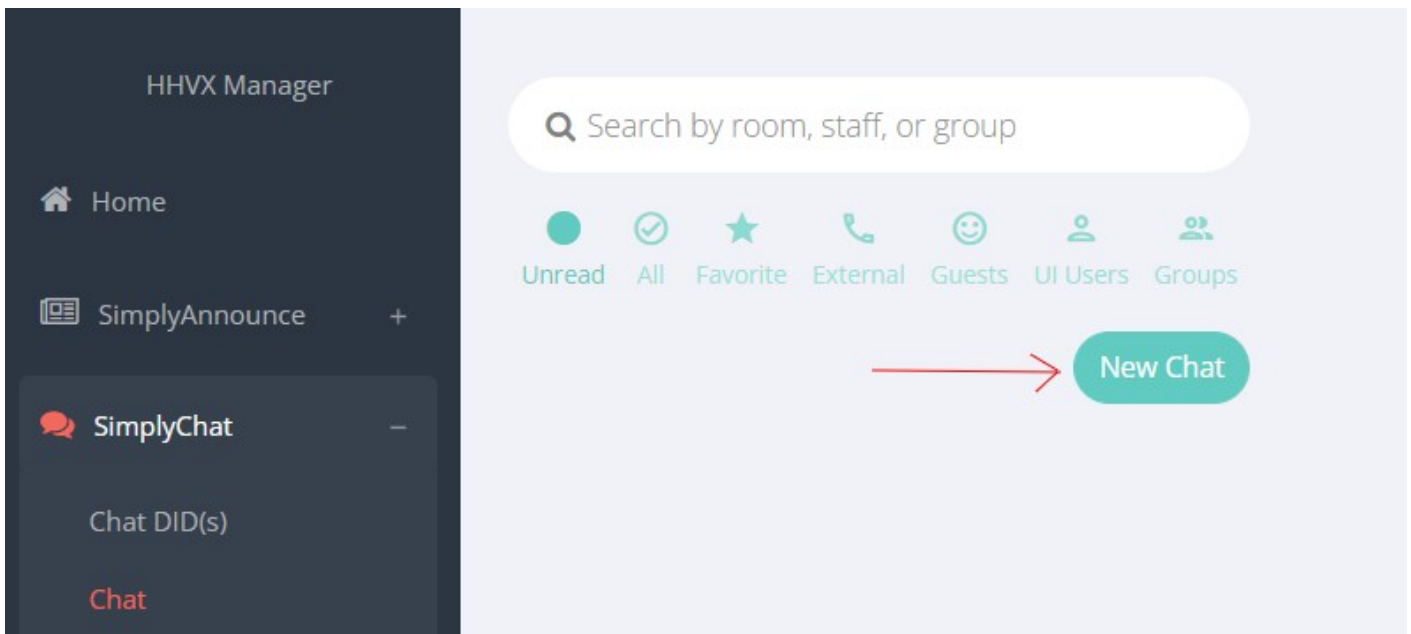
- **External:** A DID/SMS for non-guest at the hotel (visitors)
- **Guest:** A DID/SMS for guest at the hotel (check-ins)
- **UI Users:** Other users of the Client Web Portal/SimplyChat, such as other Front Desk employees, managers of the hotel, etc
- **Groups:** A grouping of users where a message can be sent to all members in that group.

## Filtering SMS Conversations



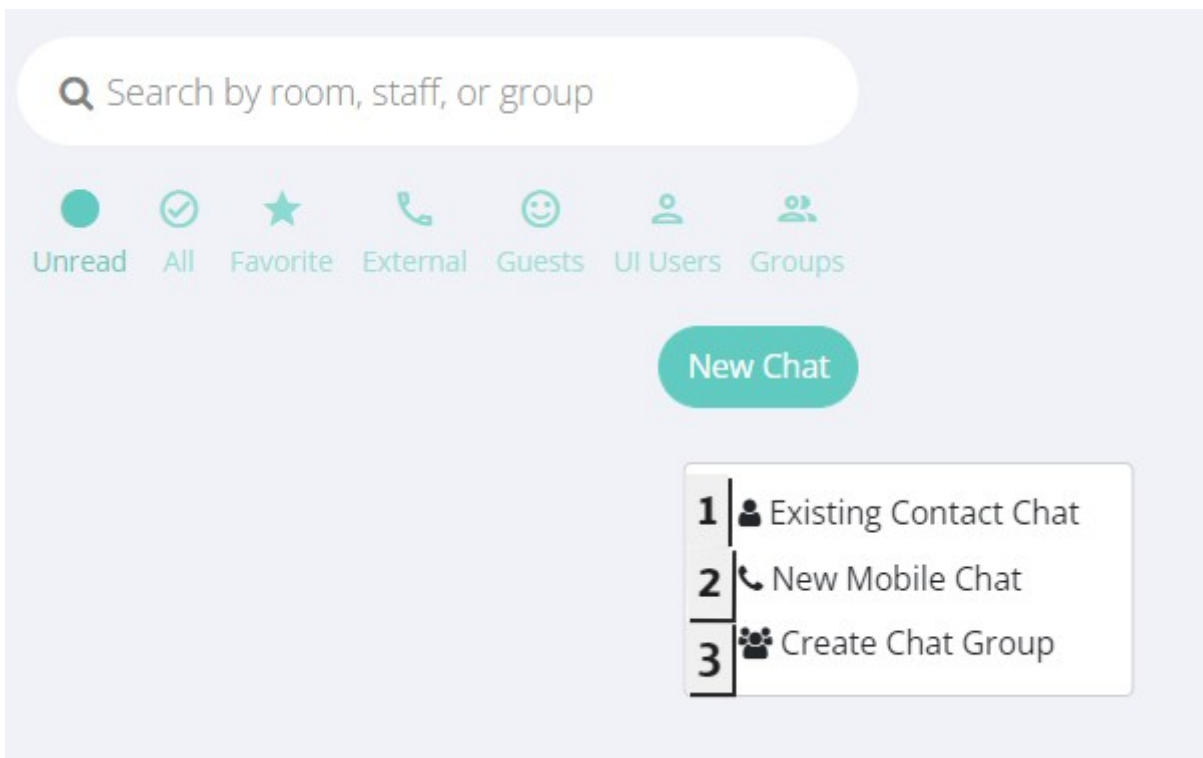
1. **Unread Conversations** - Filters and shows all **unread** conversations for the user
2. **All Conversations** - Filters and shows **all** the existing conversations for a user
3. **Favorite Conversations** - Filters and shows only **favorited** conversations for a user. Favorites allow for quick reference and navigation of often used, or currently being used conversations.
4. **External Conversations** - Filters and shows only **External** type conversations
5. **Guest Conversations** - Filters and shows only **Guest** type conversations
6. **UI Users Conversations** - Filters and shows only **UI Users** type conversations
7. **Group Conversations** - Filters and shows only **Group** type conversations
8. **Search Conversations** - Allows a users to search conversations by **Room, Staff** or **Group**

## Starting an SMS Conversation



- You can start a new SMS Conversation by selecting the **New Chat** button as seen in the image above

## Types of New Conversations:

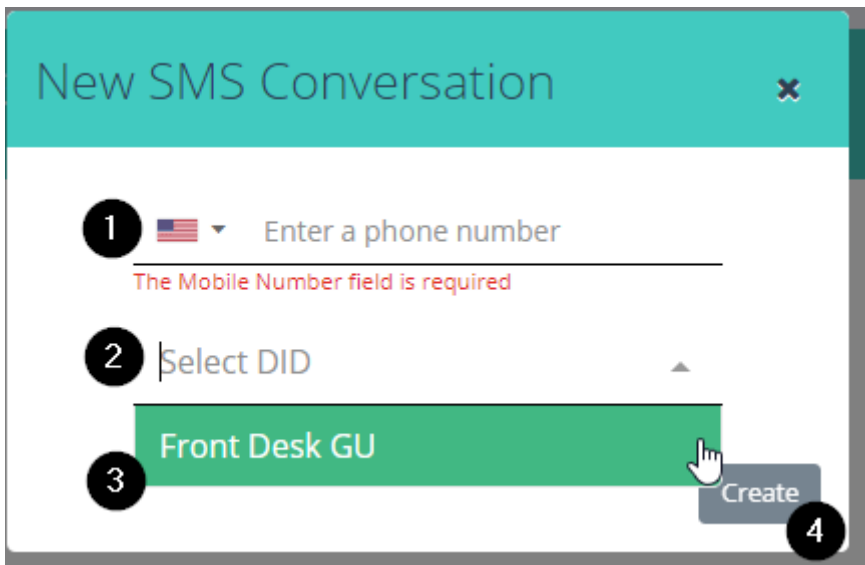


1. **Existing Contact Chat:** Starts a new SMS conversation with a SimplyChat User/Contact

2. **New Mobile Chat:** Starts a new SMS conversation where you enter a DID (mobile number) not previously used
3. **Create Chat Group:** Starts a new group conversation with participants in a group.

## New Mobile

Starts a new conversation where you enter a new DID/SMS number that has not been previously used before.

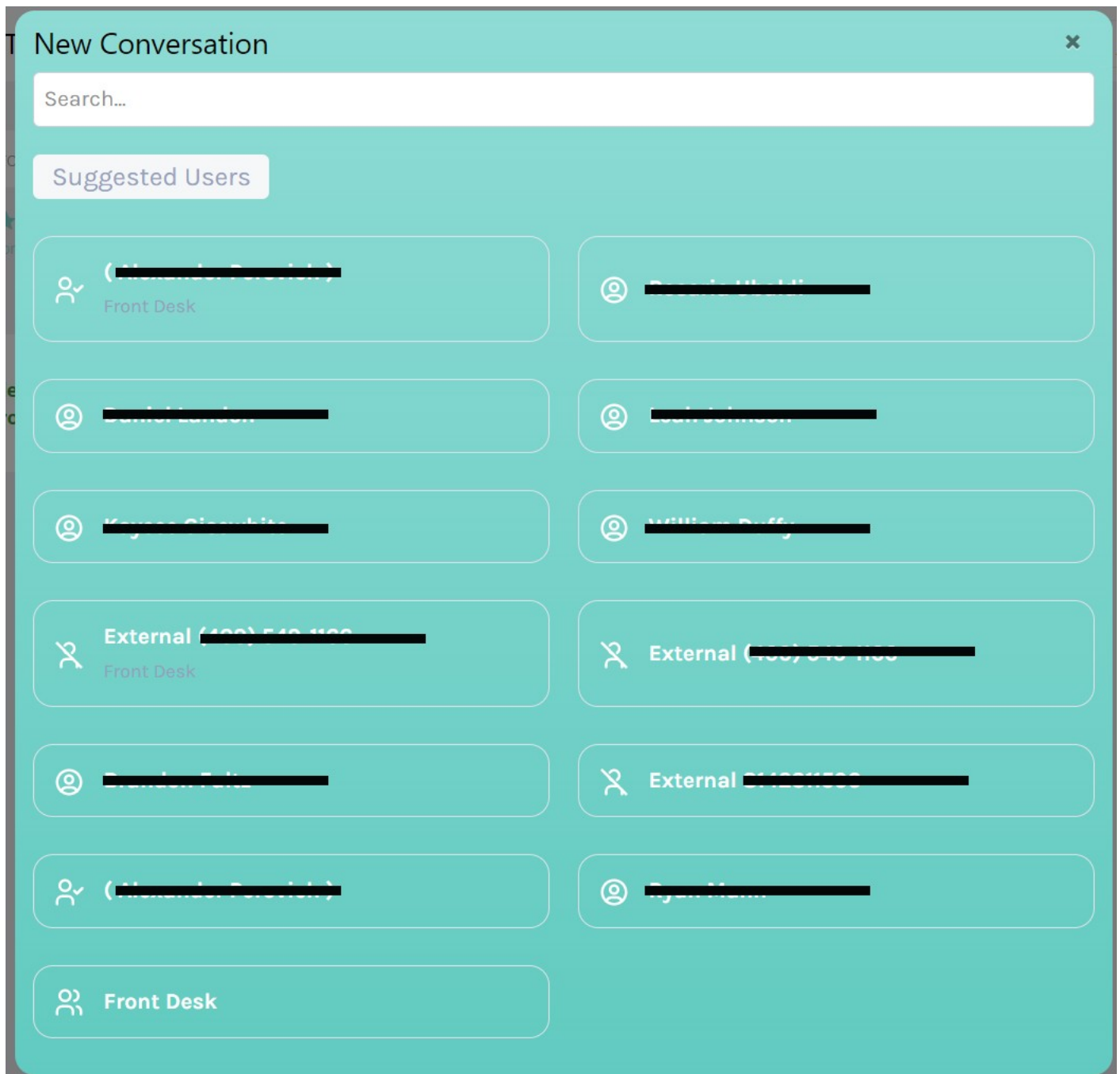


The screenshot shows a 'New SMS Conversation' dialog box. It has a teal header with a close button (X). The main area is white and contains four numbered steps: 1. A text input field with a US flag icon and the placeholder 'Enter a phone number'. Below it, a red error message reads 'The Mobile Number field is required'. 2. A dropdown menu with the placeholder 'Select DID'. 3. A green button labeled 'Front Desk GU'. 4. A grey button labeled 'Create'. A hand cursor is pointing at the 'Create' button.

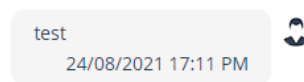
1. Enter the recipient's DID/SMS number you wish to communicate with (cell phone number)
2. Select the DID you wish to use to communicate. The recipient will see this telephone number when the text message is sent, and will be replying to this telephone number.
3. DIDs to send messages **from** can be assigned to individuals or groups. Such a "Front Desk" Group where everyone in that group will be using the same DID to send messages.
4. Click **Create** to start the conversation with the entered recipient phone number & selected DID

## Existing Contact

- Starts a new conversation with previously used contact. You can select a contact to resume a conversation or start a new one with a previously saved contact.

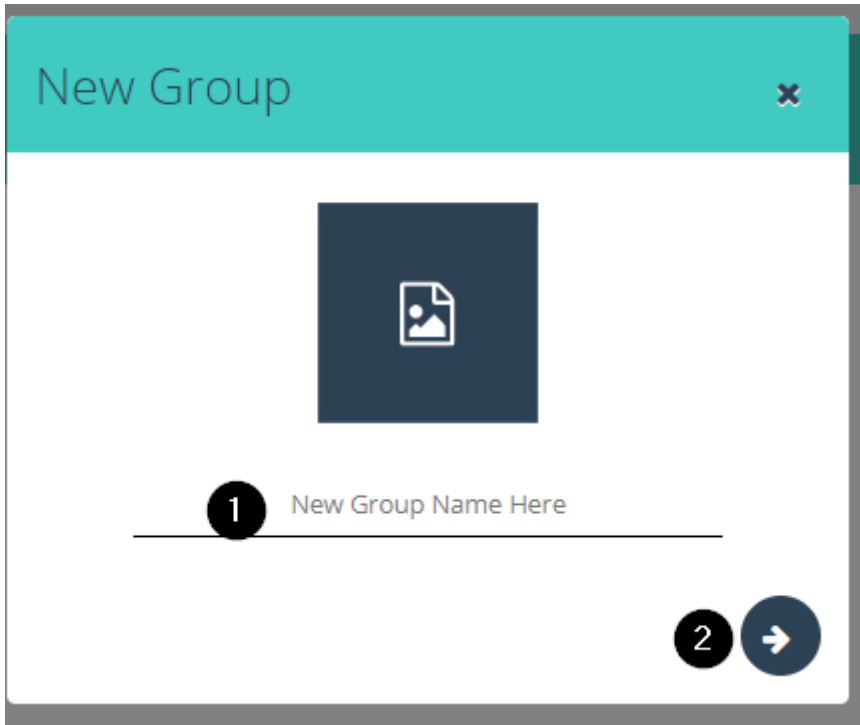


- Select **Pick Up** to take over the conversation from another user and begin conversing. (circle 1 in picture below)



# Create Chat Group

This option allows you to create a new **Group Conversation** with only the selected users you wish to be in the group.

A screenshot of a 'New Group' dialog box. The dialog has a teal header bar with the text 'New Group' and a close button (an 'x' icon). Below the header is a large dark blue square containing a white icon of a document with a picture, representing a group profile picture. Below this is a text input field with a placeholder text 'New Group Name Here'. A small black circle with the number '1' is positioned to the left of the input field. At the bottom right of the dialog, there is a black circle with the number '2' and a blue circular button with a white right-pointing arrow.

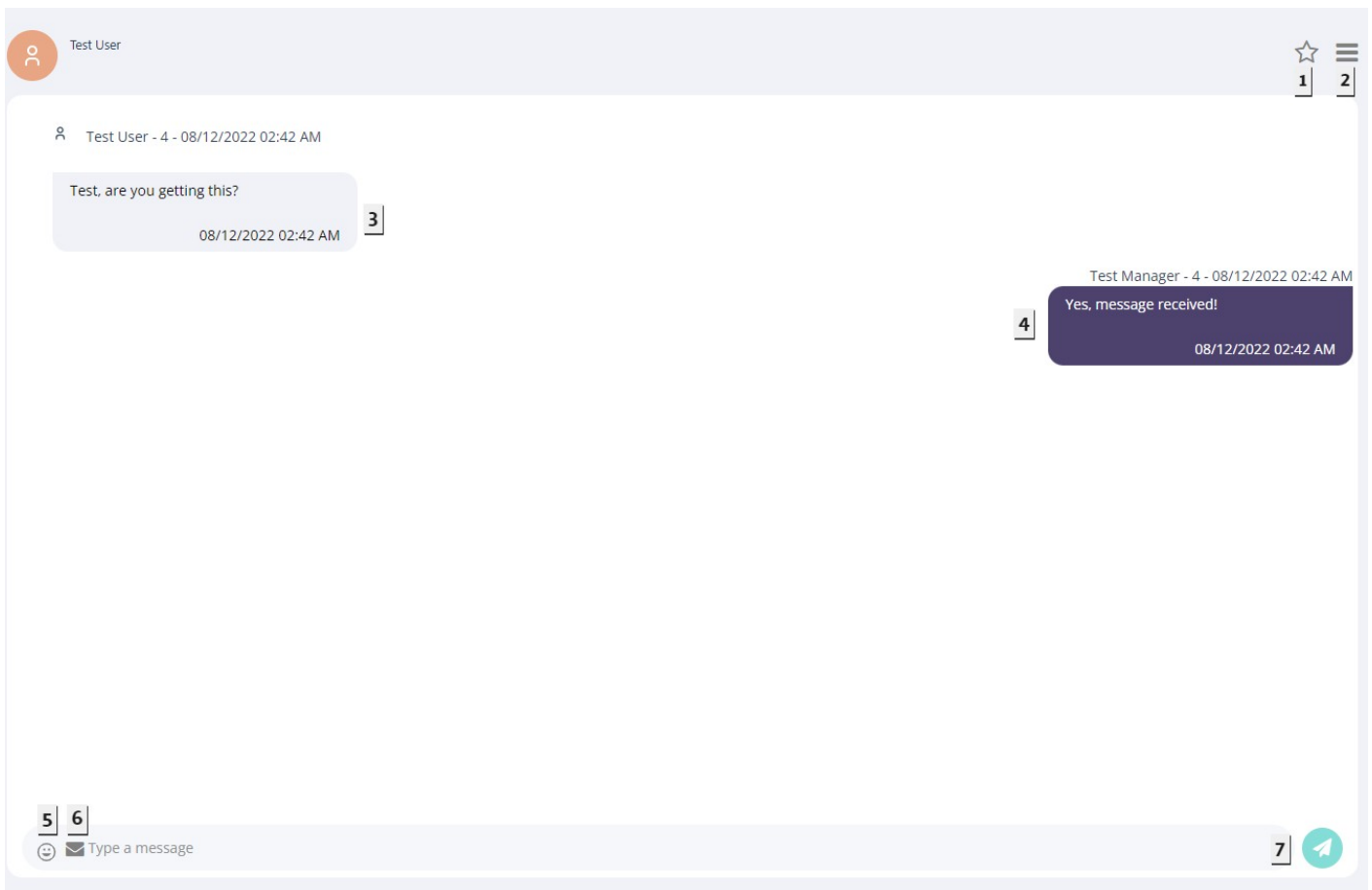
1. Enter a name for the **Group Conversation**
2. Click the arrow to choose your Group Conversation participants

The screenshot shows a dialog box titled "Add Participants" with a teal header and a close button (X) in the top right corner. Below the header, there are two radio buttons: "Contacts" (selected, indicated by a blue dot and callout 1) and "Contact Lists" (unselected, indicated by a grey dot and callout 2). Below these is a search bar with the placeholder text "Search by staff name" and a magnifying glass icon, with callout 3 pointing to the search bar. To the right of the search bar is a "Create" button with callout 6. Below the search bar, the word "Suggested" is displayed. To the right of "Suggested" is a "Select All" checkbox with callout 4. Below this is a list of names, each followed by a checkbox. The names are: FDTTest FD2, Test User, Test Manager, Bob Parks, Yeffrey Diaz, Alexander Perovich, Melissa Schneider, FDTTest, and Yeffry Diaz. Callout 5 points to the checkbox next to "Test User".

1. This radio button shows list of **Contacts** in the list shown below the **Create** button
2. This radio button toggles the list to show **Contact Lists** below the **Creast button**
3. **Search** field to search for contacts or users
4. **Select All** check the checkbox to select all contacts as listed below the **Create** button
5. Check boxes next to the contact name allows you to select, or de-select the contact to add to the group
6. **Create** button creates the group with the selected contacts

## The Conversation Screen





1. **Favorite:** Favorites the conversation for an easy reference using the **Favorites Filter**
2. **Contact Info:** Shows relevant information for the contact in the conversation such as name, email, phone number, reservations or other contact info.
3. **Received Messages:** Replies to you, the user, will be in dark green
4. **Sent Messages:** Messages sent to the contact twill be light gray
5. **Emoji:** List of emojis that can be sent in the conversation
6. **Message Templates:** Shortcut to the canned responses, or message templates, that allow for quick responses to common questions or responses.
7. **Send Button:** Sens message written above to the recipient.

# Chatting Party Types

## Messaging Method Capability Matrix

The below tables shows which parties can communicate and available methods. Across the top are the senders who initiate a message and along the left are the receivers of the message.

There are 2 possible method of communications:

Web - users will be able to communicate using the online SimplyChat chat interface

SMS - users will be able to communicate using their SMS capable devices

Web2Web = A message is sent from the online SimplyChat chat interface and received by the party within their online SimplyChat chat interface

Web2SMS = A message is sent from the online SimplyChat chat interface and received by the parties SMS capable device

SMS2SMS = A message is sent from a SMS capable device and received by a SMS capable device

SMS2Web = A message is sent from a SMS capable device and received within the the online SimplyChat chat interface

	Message Senders							
		UIU	UIUD	UIUDM	GU	GC	MV	MG
Message Receivers	UIU	Web2Web	Web2Web	Web2Web	Web2Web*			
	UIUD	Web2Web Web2SMS	Web2Web Web2SMS SMS2Web SMS2SMS	Web2Web	Web2Web*		SMS2Web SMS2SMS	SMS2Web SMS2SMS
	UIUDM	Web2Web	Web2Web	Web2Web	Web2Web*			
	GU	Web2Web	Web2Web	Web2Web			SMS2Web	SMS2Web
	GC					Web2Web		
	MV		Web2SMS SMS2SMS		Web2SMS*			
	MG		Web2SMS SMS2SMS		Web2SMS*			

Web2Web\* = User can only reply to a conversation originated by another party

Web2SMS\* = User can only reply to a conversation originated by another party

## Definitions of User Types / Parties

UIU = Online Web Chat User

UIUD = Online Web Chat User with direct SMS number to receive messages from external SMS capable devices.

UIUDM = Online Web Chat User with mobile number to receive notifications. (Not for 2 way communication).

GU = Group User part of an inbound SMS group. All group members will receive SMS messages when sent from external SMS devices to dedicated inbound SMS number (DID).

GC = Group Chat between UIU(D)(M) for internal conversations. No external SMS messages will be sent or received. No SMS number can be assigned to Group Chats.

MV = Visitor, External SMS device not associated to a room.

MG = Guest, External SMS device associated with a checked in room.

# Chat Groups

## Overview

Chat Groups are used for adding users of the CWP to a group, not SMS DIDs

Chat groups allow you to add multiple participants to a conversation. Any messages you send will be sent to all recipients you choose to make a group with.

## Creating A Group

- Click the **Create New** button
- **Name** the group and click **Submit**

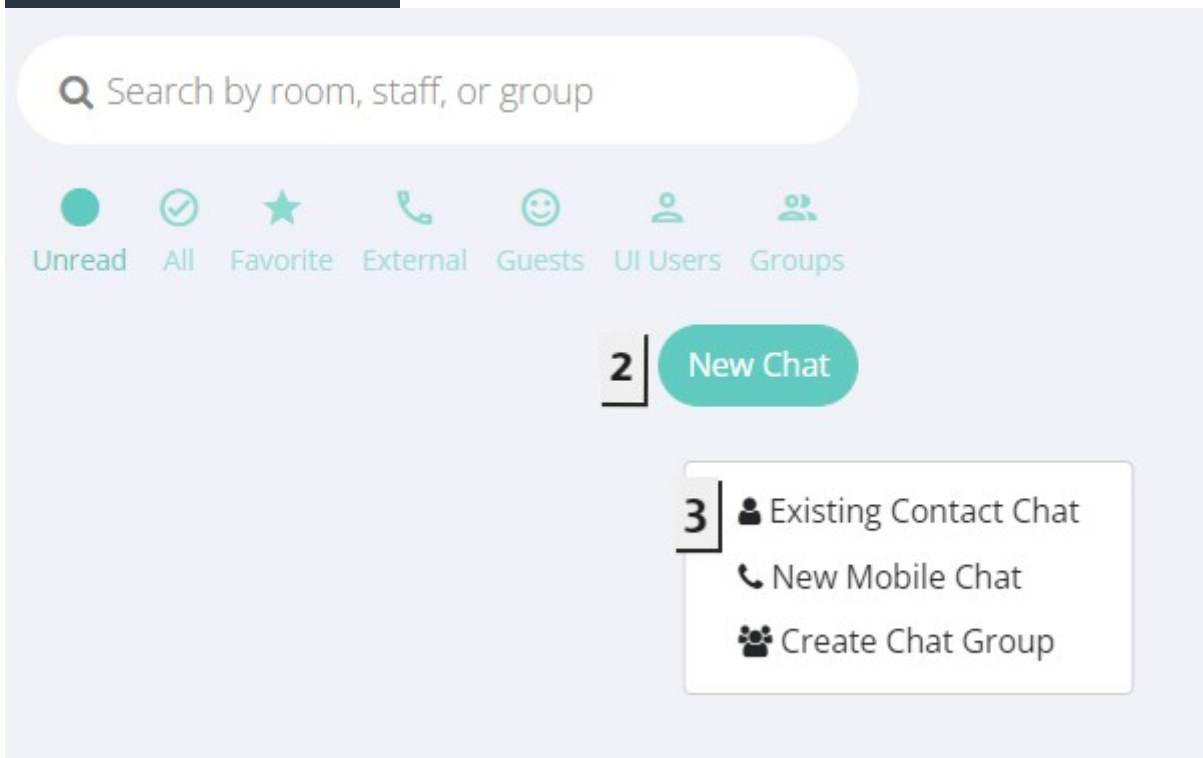
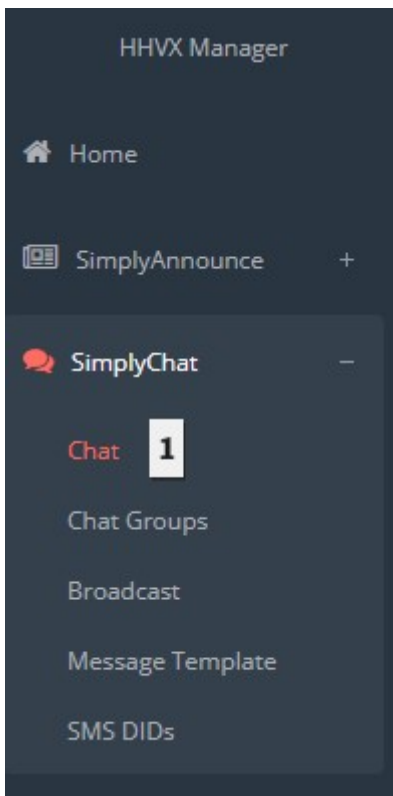
## Add Users To A Group

- **Find** the group in the list of groups and click the **Action** button
- Select the **View** button
- In the list of users, click **Attach User** to the users you wish to add to this chat group.
- Once the **Attach** button is pressed, the user is added to the group. To go to the previous screen click the **Back** button

## Remove Users From A Group

- **Find** the group you wish to remove users from in the list under **Chat Groups**
- Click the **Action** button and select **View**
- In the list of users, click the **Remove User** button to remove a user from the group

## Chat With A Group



1. Click **Chat** in the left hand menu
2. Click the **New Chat** sign on the page that loads
3. Select **Existing Contact** to bring up a list of contacts
4. Select the **Group** you wish to add. In the image below, the multiple person icon indicates a group (ex. *Front Desk*)

New Conversation

Search...

Suggested Users

(████████████████████)

Front Desk

████████████████████

████████████████████

████████████████████

████████████████████

████████████████████

External (████████████████████)

Front Desk

████████████████████

████████████████████

External (████████████████████)

(████████████████████)

████████████████████

Front Desk

████████████████████

████████████████████

████████████████████

████████████████████

External (████████████████████)

████████████████████

████████████████████

████████████████████

# Broadcast Message

## Overview

Broadcast message allows you to send a message to several contacts at once despite if they're in a group or not. Unlike group chat, the broadcast messages goes to the individual only, and their replies are not seen by anyone else besides the SimplyChat user(s).

## Create a Broadcast Message

- Click "Create Broadcast Message" in the upper right hand corner of the screen

Message Broadcast

Broadcast For

1

☒ Staff

☐ Guest

☐ External

☐ Contact List

Broadcast to Staff\*

☐ Bob Parks

☐ FDTest

☐ FDTest FD2

☐

☐ Select All

Broadcast Message\*

3

Message Template\*

Default Chat Group Time Out Response Message

4

5

Send

Close

1. **Broadcast For:** Filter contacts between Staff, Guest, External or Contact List
2. **Select:** Check the checkbox to the contact(s) you wish to have the message broadcast to
3. **Broadcast Message:** Type the message you wish to broadcast into this field
4. **Message Template:** You can also select a pre-made template to auto fill the **Broadcast Message** field
5. **Send:** Send the message

## Continuing the Conversation

You can view broadcast messages, and continue the conversation with that individual contact by going back to the **Chat** module by click on "**Chat**" located in the left hand menu



# Delete Broadcast Message

You can delete the "Broadcast Message" by clicking on "**Action**" and then "**Delete**"

Note: Deleting the Broadcast Message" **does not** un-send the message.

# Message Template

## Overview

**Message Templates** allow you to create commonly used messages that can easily be selected to save time sending messages to others.

## Create New Message Template

- To create a new message template, click on the "**Create New**" button in the upper right hand corner of the page.
- Name your template in the **Title** field
- Key: the placeholder used to call the "shortcode"
- Type the message you wish to make a template out of in the **Message** field
- Check the **Enable** checkbox to make the message template available for use
- Click the **Create** button to save the message template

## Shortcodes

## Merge Fields



@@chatgroup\_timeout\_response\_message@@

@@guestname@@

@@hotelname@@

@@firstname@@

@@lastname@@

@@room\_number@@

@@hotel\_contact@@

@@hotel\_address@@

@@hotel\_city@@

@@hotel\_state@@

@@hotel\_zip@@

@@hotel\_fax@@

---

Shortcodes (merge fields) allow you to use placeholders that will update with the relevant information automatically when sent. For example @@firstname@@ will be replaced automatically with the guest's first name, or @@room\_number@@ will be replaced with the room number automatically, etc. This allows you to create personal and relevant message templates.

# SMS DIDs

## Overview

SMS DIDs are the list of telephone numbers the SimplyChat module for your hotel can use. You can assign DIDs (telephone numbers) to specific users **or** groups (note: you can't assign to specific users **and** group(s) at the same time).

Edit DID

1

Number\*:  
[REDACTED]19992

2

Description\*:  
UIUD SMS

*Did can be assigned to either Group or Subscriber.*

3

SimplyChat Group:  
Sales GU

4

SimplyChat Subscriber:  
-

1. The DID (telephone number) being modified
2. **Description** allows you to briefly describe the DID
3. **SimplyChat Group**: drop down lets you select the group you wish to assign the DID to
4. **SimplyChat Subscriber**: drop down lets you select the single user to assign the DID to

You can either use **SimplyChat Group** or **SimplyChat Subscriber** you cannot use both

