

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

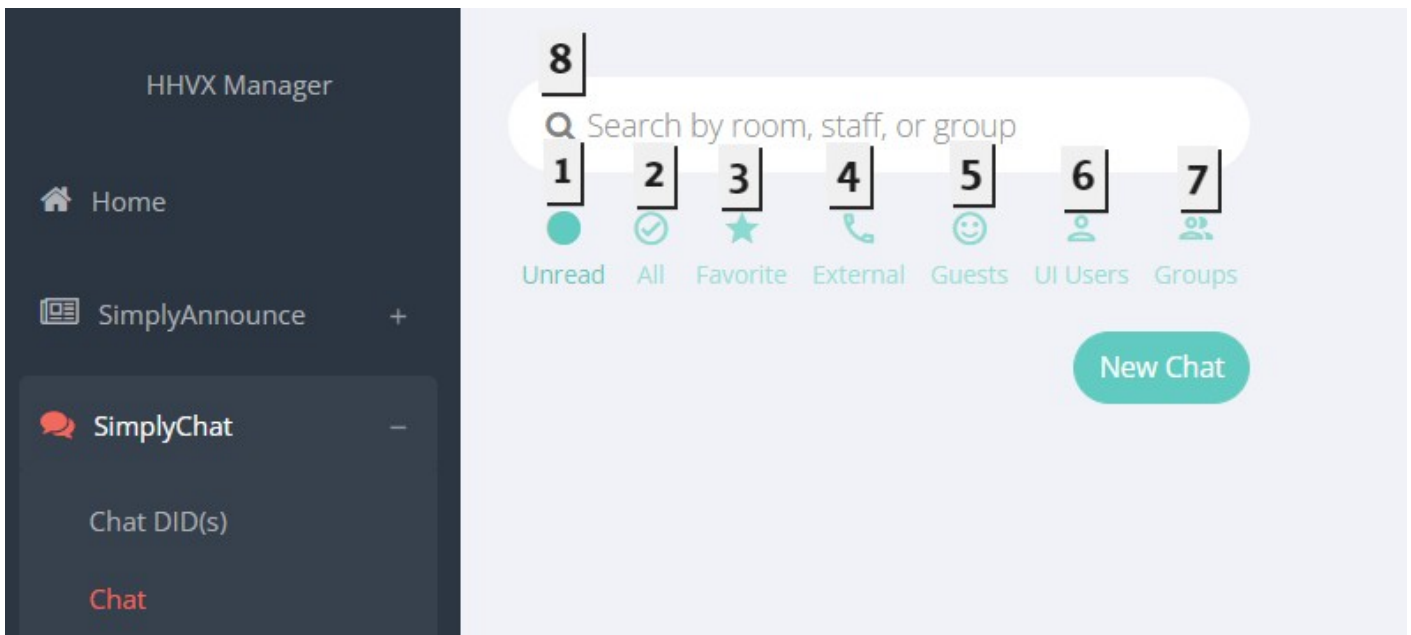
Terms:

- **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

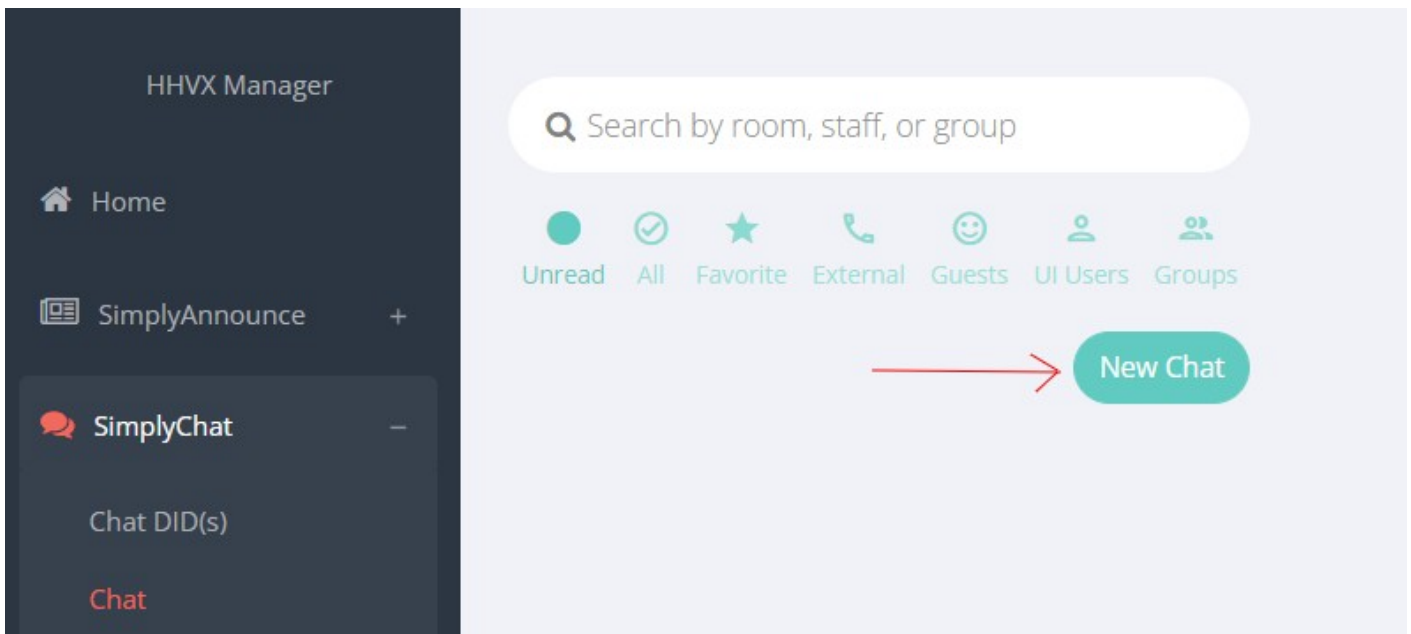
- **External**: A DID/SMS for non-guest at the hotel (visitors)
- **Guest**: A DID/SMS for guest at the hotel (check-ins)
- **UI Users**: Other users of the Client Web Portal/SimplyChat, such as other Front Desk employees, managers of the hotel, etc
- **Groups**: A grouping of users where a message can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

Filtering SMS Conversations



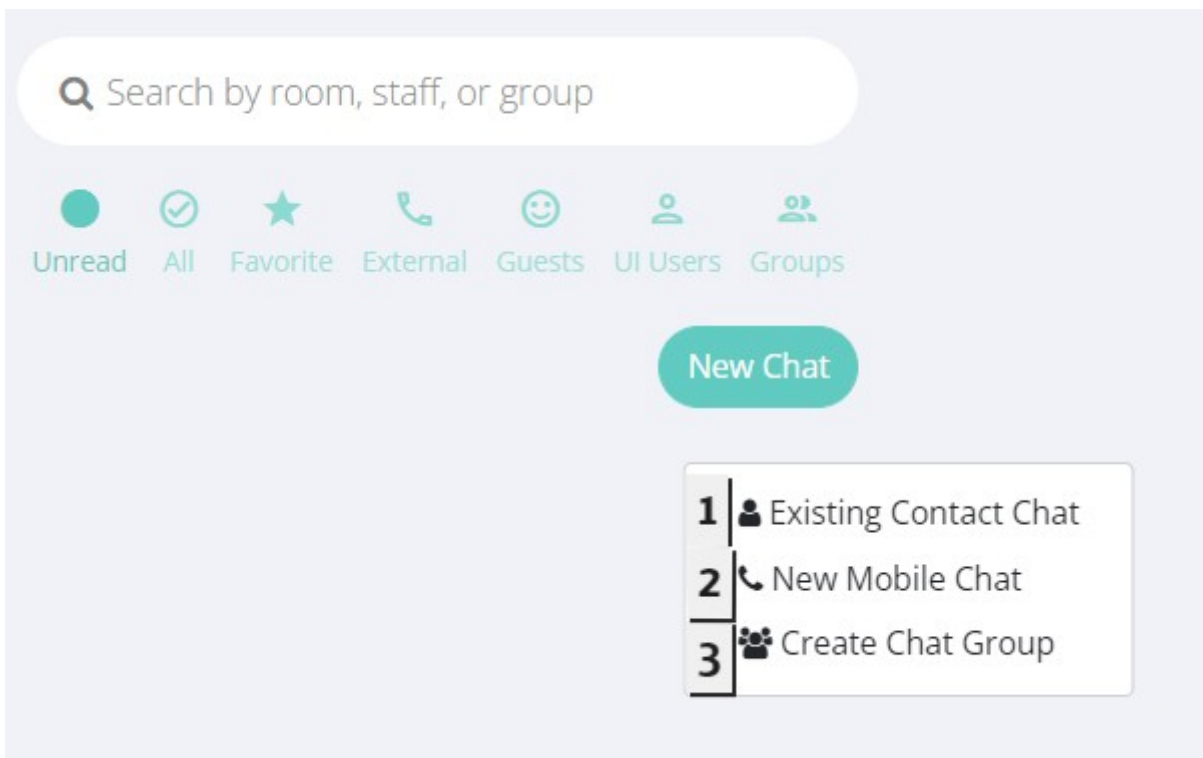
1. **Unread Conversations** - Filters and shows all **unread** conversations for the user
2. **All Conversations** - Filters and shows **all** the existing conversations for a user
3. **Favorite Conversations** - Filters and shows only **favorited** conversations for a user. Favorites allow for quick 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:

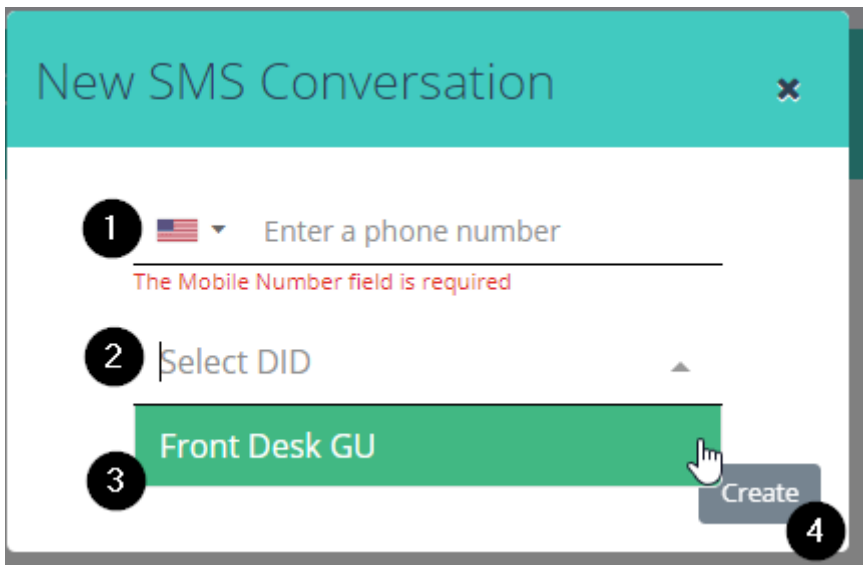


1. **Existing Contact Chat:** Starts a new SMS conversation with a SimplyChat User/Contact

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.

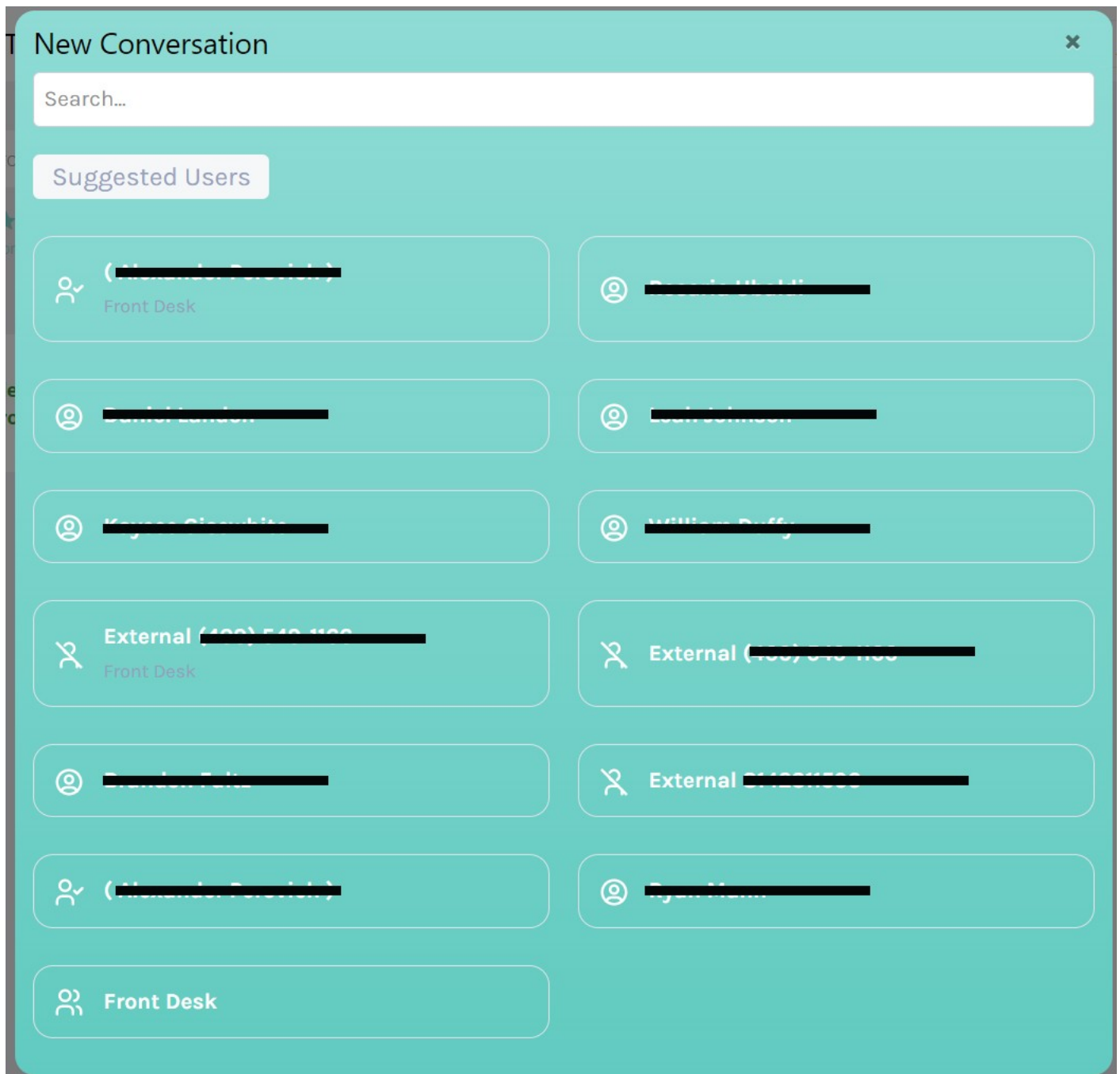


The screenshot shows a 'New SMS Conversation' dialog box. It has a teal header with the title and a close button. Below the header, there are four numbered steps: 1. A phone number input field with a US flag dropdown and a red error message 'The Mobile Number field is required'. 2. A 'Select DID' dropdown menu. 3. A green selection bar labeled 'Front Desk GU'. 4. A 'Create' button.

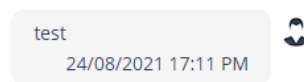
1. Enter the recipient's DID/SMS number you wish to communicate with (cell phone number)
2. Select the DID you wish to use to communicate. The recipient will see this telephone number when the text message is sent, and will be replying to this telephone number.
3. DIDs to send messages **from** can be 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.

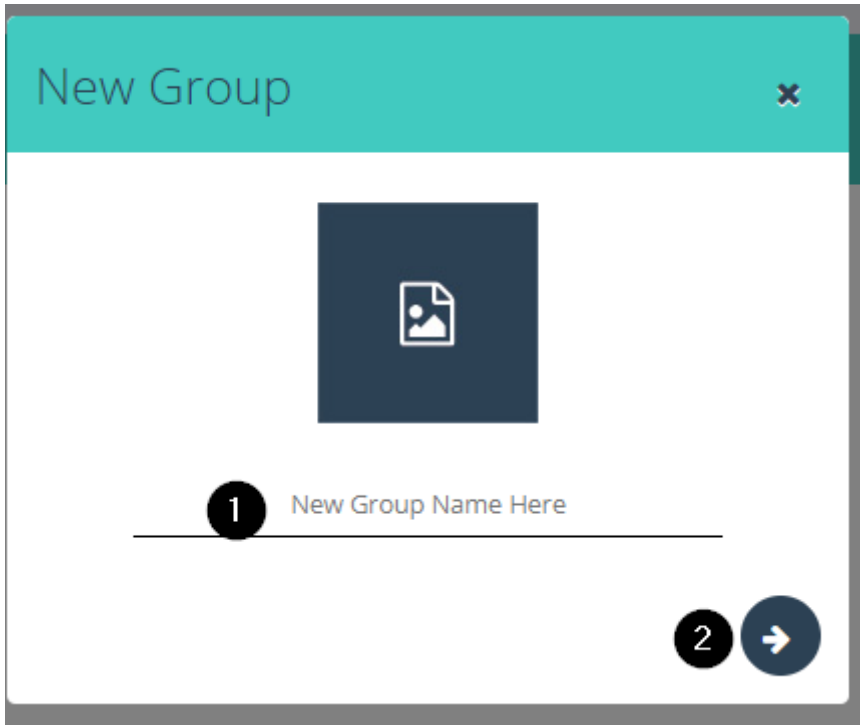


- Select **Pick Up** to take over the conversation from another user and begin conversing. (circle 1 in picture below)



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.

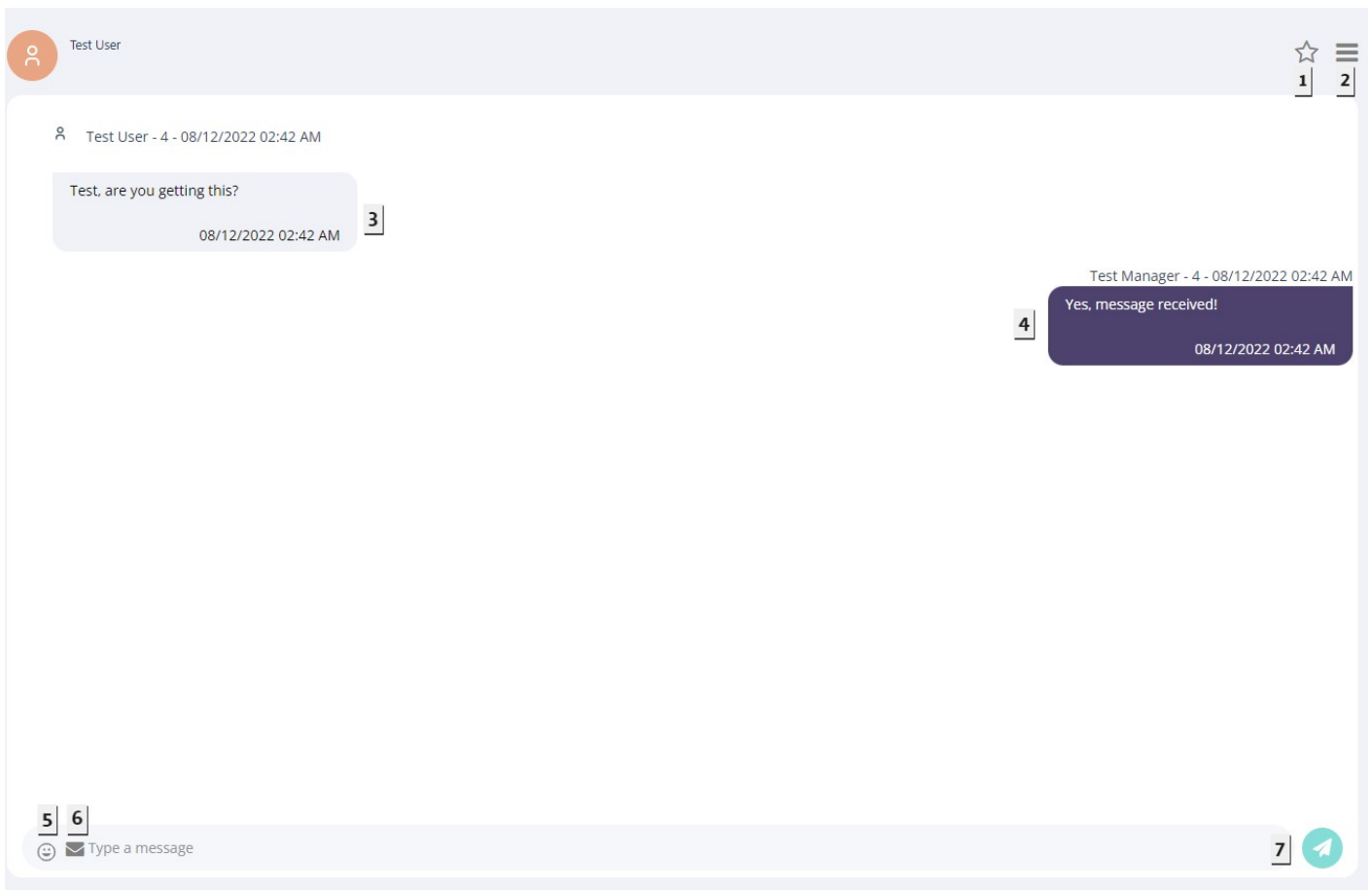
A screenshot of a 'New Group' dialog box. The dialog has a teal header bar with the text 'New Group' and a close button (an 'x' icon). Below the header, there is a dark blue square placeholder with a white icon of a document with a picture. Underneath this is a text input field with the placeholder text '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 with checkboxes to their right. The names are: "FDTest FD2", "Test User", "Test Manager", "Bob Parks", "Jeffrey Diaz", "Alexander Perovich", "Melissa Schneider", "FDTest", and "Jeffry 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 **Crear** 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.

Revision #15

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Updated 13 December 2022 15:54:47 by Cassandra DeLeon