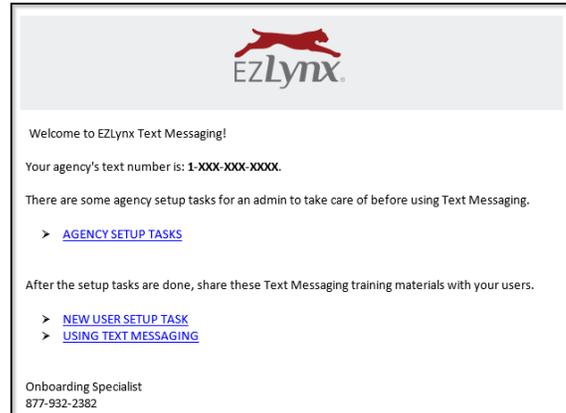# TEXT MESSAGING GUIDE

Contents

Welcome to EZLynx Text Messaging

With EZLynx Text Messaging, your agency has a unique text messaging number which is used to send and receive text messages within applicant accounts. The text messages are automatically saved as Activities to create a clear record of communications, and since Activities can't be edited or deleted, the record can be used to defend errors and omissions claims.

NEW AGENCY SETUP TASKS

When an agency is new to Text Messaging and we establish the agency's text messaging number, we email it to the admin. At that point, an admin must complete the following setup tasks before the agency begins using Text Messaging.

Watch the **Agency Setup Tasks for Text Messaging** video. Includes all of the agency setup tasks outlined below.

EZLynx.

Welcome to EZLynx Text Messaging!

Your agency's text number is: **1-XXX-XXX-XXXX**.

There are some agency setup tasks for an admin to take care of before using Text Messaging.

➢ AGENCY SETUP TASKS

After the setup tasks are done, share these Text Messaging training materials with your users.

➢ NEW USER SETUP TASK
➢ USING TEXT MESSAGING

Onboarding Specialist
877-932-2382

1 ♦ Main Office with Branches: Separate Numbers or a Single Shared Number

When an agency is setup with a Main office and branches in EZLynx, there are two options for the Text Messaging number, so you'll need to pick one of the following:

1. The main and branch offices each have their own separate number (recommended).
2. The main and branch offices share one number.

To setup sharing a single number:

1. Hover over the **Communication Center icon** and at **Voice & Text**, select **Settings**.
2. Click the **Agency Phone Number** tab.
3. Check the box to share the number and authorize any pricing changes that may be incurred.
4. Hold down the **Ctrl key** and **select each branch** to share the main office's number.
5. Click **Save Changes**.
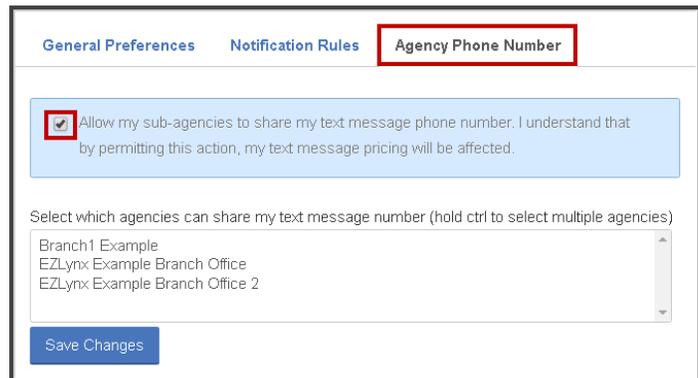
2 ♦ Customize Automated Voice & Text Replies

EZLynx automatically provides a voice or text reply when someone calls or texts your agency's text number.

1. **Calls**: Every incoming call receives this default voice message.
   - "This phone number only accepts texts. Please call our main office number directly."
2. **Texts**: The first text from a mobile number in every 6-month period receives this default text reply.
   - "Thank you, we will respond as soon as possible. No coverage is bound until specifically confirmed."

To customize the automated voice & text replies:

An admin can change the default messages to any customized message.

1. Hover over the **Communication Center icon** and under **Voice & Text**, select **Settings**.
2. At the **General Preferences** tab, see the separate areas for incoming voice calls and text messages.
3. In each area, click the **Customize** radio dial, and **enter a new custom message**.
4. Click **Save Changes**.

3 ⬧ Assign User(s) to Receive Incoming Text Notifications

By default, every time a text message is received for any applicant, all EZLynx users receive a notification. Users receive these notifications on their Agency Workspace bell icon and as pop-ups on the lower right side of their computer screen.

To assign specific users to receive incoming text notifications:

1. Hover over the **Communication Center icon** and under **Voice & Text**, select **Settings**.
2. Click the **Notification Rules** tab.
3. At the right of the appropriate **Organization**, click **Edit**.
4. At "**Notify when message received**", uncheck the **All Users** box.
5. Now there are two options:
   a) Check the **Notify Assigned User** box. (The Assigned user receives an email for every incoming text and these emails cannot be disabled.)
   b) Add a **Specific User** by typing their name in the box, then select user from the results. Add as many specific users as you'd like.
6. Click **Save**.

4 ⬧ Assign User(s) to Work Unresolved Text Messages

Every applicant and co-applicant has a field on their Details tab for entering a mobile number. When an incoming text doesn't match an applicant or co-applicant's mobile number or matches the number for multiple applicants, the text is designated as **Unresolved**. To ensure your agency is providing excellent customer service, unresolved text messages should be worked quickly and regularly.

By default, all EZLynx users receive a notification for every unresolved text message, we recommend assigning one or two specific people in the agency to be responsible for the important task for working unresolved messages.

To assign user(s) to receive unresolved message notifications:
1. Hover over the **Communication Center icon**, and under **Voice & Text**, select **Settings**.
2. Click the **Notification Rules** tab.
3. At the right of the appropriate **Organization**, click **Edit**.
4. At "**Notify when message unresolved**", uncheck the **All Users** box.
5. Type a user's name in the box, then select the user from the results. Repeat to add all of the users that will be responsible for working unresolved text messages.
6. Click **Save**.
7. Provide the user(s) the training materials for learning how to Work Unresolved Text Messages.

Watch the Working Unresolved Text Messages video. 2 min.

---

5 ⬥ Share Text Number with Users & Provide Training Materials

For training purposes, share this guide and the Text Messaging 101 video with all of the users in your agency.
- As a standard practice, all users should actively get the mobile numbers of prospects and customers and add them to applicant accounts. This makes using Text Messaging more effective.
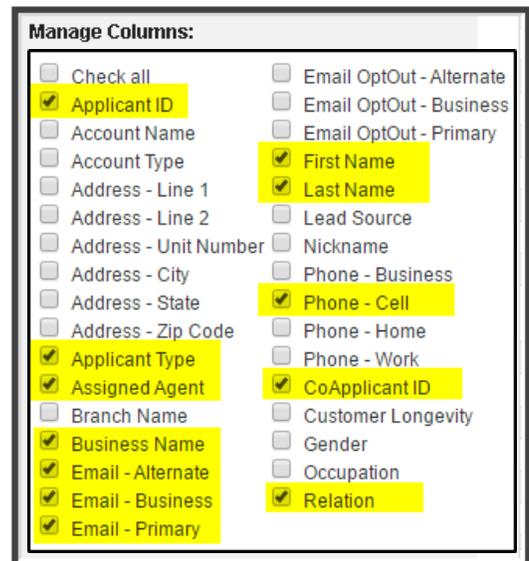
6 ⬥ Share Text Number with Agency Contacts

The best way to share the text number with agency contacts is by bulk email. Here we'll show you how to run a report of agency contacts that can be used for the bulk email recipient list.

1. Hover over the **Reports icon**, select **Applicant** and the **Applicant Detail** report.
2. **Set filters on the left** as appropriate.
    - At **Relation** – select **Insured & Co-applicant**.
    - At **Columns**, select at least those in the screenshot.
      To send an **EZLynx Email Campaign**, use the **Save icon** at upper right.
    To use **another bulk email service**, use the **Export icon** at upper right.
3. Use EZLynx Email Campaigns or other bulk email to **notify agency contacts**.
    - Provide the agency's text number.
    - Have them add the number to their mobile contacts, so they'll quickly recognize agency texts.
    - This is a good time to request mobile numbers for any applicants whose mobile number is missing on the Applicant Detail report.


Manage Columns:

Column	Selected	Column	Selected
Check all	☐	Email OptOut - Alternate	☐
Applicant ID	☑	Email OptOut - Business	☐
Account Name	☐	Email OptOut - Primary	☐
Account Type	☐	First Name	☑
Address - Line 1	☐	Last Name	☑
Address - Line 2	☐	Lead Source	☐
Address - Unit Number	☐	Nickname	☐
Address - City	☐	Phone - Business	☐
Address - State	☐	Phone - Cell	☑
Address - Zip Code	☐	Phone - Home	☐
Applicant Type	☑	Phone - Work	☐
Assigned Agent	☑	CoApplicant ID	☑
Branch Name	☐	Customer Longevity	☐
Business Name	☑	Gender	☐
Email - Alternate	☑	Occupation	☐
Email - Business	☑	Relation	☑
Email - Primary	☑		

NEW USER SETUP TASK

7 ◆ Add a Mobile # for Text Reminders

Every new user should complete this setup task before using Text Messaging. When creating a task in EZLynx, Text Messaging users have the option to schedule a text reminder. To use this feature, a user must add their mobile number to their account settings.

1. Hover over the **Settings icon**.
2. Select **My Contact Info**.
3. Enter your **mobile #**, and click **Save**.
4. Now when adding a task to a note, you'll have the option to select a text reminder. (see screenshot)
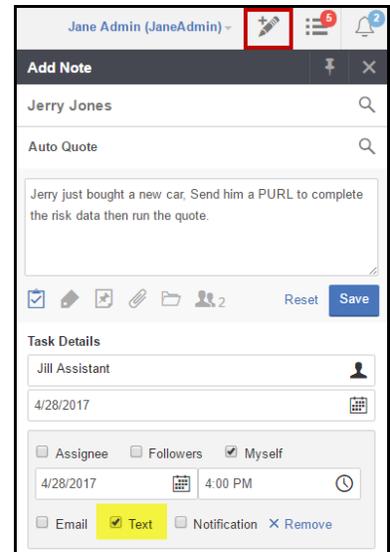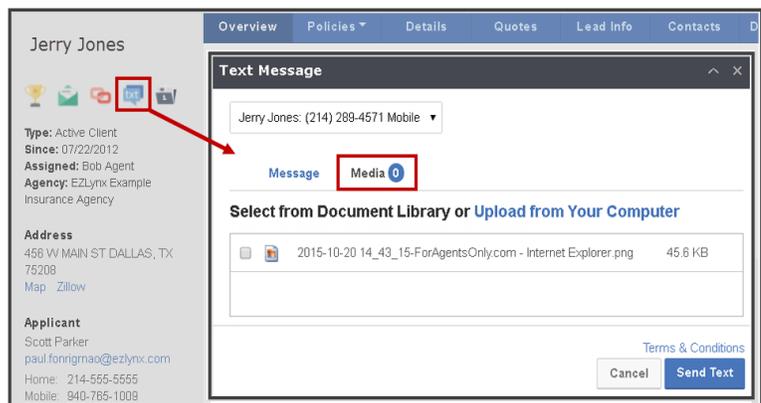
USING TEXT MESSAGING

Training is key to getting the most from your agency's EZLynx products. Every new user to Text Messaging has a variety of options for learning to use the feature; a video, this guide and knowledge base articles.

Watch the Using Text Messaging 101 video. 3 min.

8 ◆ Send a Text Message

Text messages are set directly from an applicant account. Every EZLynx user can send unlimited text messages.

1. Go to the applicant account.
2. Check that the mobile number is available:
   - For the **applicant or co-applicant**, go to the **Details** tab.
   - For **applicant contacts**, go to the **Contacts** tab.
3. Click the **Text icon** in the left side pane.
4. Select a **mobile #** from the drop-down.
   - Applicant, co-applicant and contacts' mobile #s entered in EZLynx are listed here.
5. On the **Message** tab, enter a **text message**.
6. Optionally, on the **Media** tab, select media from the list (populated from the Documents tab), or upload media from your computer.
   - We support common image, video and voice media files.
   - If you don't have the media tab, contact onboarding@ezlynx.com for setup information.
7. Click **Send Text**.
8. A copy of the text message is saved on the applicant's **Activity** tab.

9 ⬧ Incoming Text Message Basics

1. Every incoming text is **saved to the applicant's Activity tab** - unless designated as **unresolved**.
2. By default, every user receives a notification for every incoming text message and you can send a reply text directly from these notifications.
   - Notifications are located on a user's Agency Workspace bell icon and present as a pop-up on the lower right corner of their browser window – these are seen even if you're working in another website other than EZLynx.
   - An agency admin can designate specific users to receive these notifications instead of every user in the agency.
3. For every incoming text, the applicant's **"Assigned" user receives an email**. These emails cannot be disabled.
4. An **automated reply** is sent for the **first incoming text from a mobile number during every 6-month period**:
   - This is the reply unless an agency admin customizes the message -
     "We will respond as soon as possible. No coverage is bound until specifically confirmed."

10 ⬧ Unresolved Text Messages

When an incoming text's mobile number doesn't match an applicant's mobile number in EZLynx or matches multiple applicants, the text is designated as "unresolved". In order to provide excellent customer service, it is important to work unresolved text messages quickly and regularly.

By default, every time an unresolved text message is received, for any applicant, all EZLynx users receive a notification, both on their Agency Workspace bell icon and as a pop-up on the lower right side of their browser window. However, your agency admin may assign one or two specific people in the agency to receive and be responsible for working unresolved messages. Ask your admin who is responsible for working unresolved text messages in your agency.

The Unresolved Messages page can be accessed in a few ways:
1. On the **Dashboard Home Page**, at the **Text Messages box**.
2. Hover over the **Communication Center icon**, and at **Voice and Text**, selecting **Unresolved**.
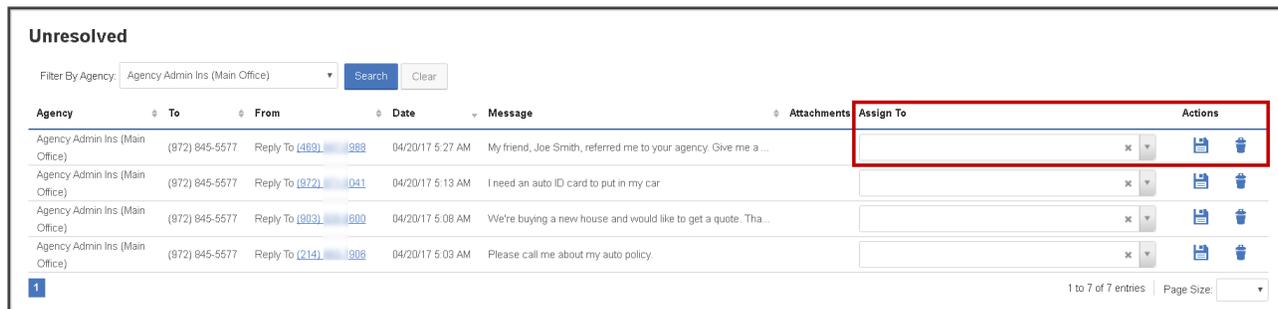3. From an **Agency Workspace notification**, click the **Resolve** link.

Types of unresolved text messages:
1. **Unknown Number** – some notifications will say "Text from Unknown Number" which means the text message's mobile number does not match the mobile number for any applicant or co-applicant in EZLynx. You have to take action to identify the message sender.
2. **Multiple Matching Applicants** – some notifications with say "Multiple Matching Applicants" which means the text message's mobile number is associated with multiple applicants in EZLynx. The fastest way to resolve this type of message is to type the number in the applicant search located at the upper left of all EZLynx pages.

To work an unresolved text message:

Watch the Working Unresolved Text Messages video. 2 min.

1. Go to the **Unresolved Messages page** (see above).
2. For **agencies setup with branches** in EZLynx, go to the upper left and **select** "**All Agencies**" **or a specific agency** from the dropdown.
3. Each unresolved text has these options:
   - **Send a Reply Text** - click the "from" mobile number link to quickly send a reply text - maybe ask for the person's name and answer their message.
   - If applicable, viewing a **media attachment may help to identify the applicant**.
   - For **multiple matching applicants**, type the number in the **applicant search box** to locate the multiple applicants.
   - **Once identified, assign to an Applicant** - type their name in the search applicant field and select from the results and click the **Save icon**. The message is moved to the applicant's Activity tab.
   - **Delete** - if the message was received in error or for any other reason, use the **Trash icon**.

11 ⬧ Calls to the Text Number

If someone calls the text number, they receive an automated voice reply.

This is the **reply unless an agency admin customizes the message -**
"This number only accepts texts. Please call our main office number directly."

12 ⬧ Access All Sent and Received Text Messages

Sometimes users want to see a list of all incoming and outgoing texts for every applicant in EZLynx. This is easy to do.

1. Hover over the **Communication Center icon**, and under **Voice & Text**, select **Sent and Received**.
2. On this page, at the far right of **each text under Actions**, there are links to **Reply or Resolve** messages.
3. Multiple search filters are available in the dropdown menu at top left of page.

Questions? Contact support@ezlynx.com.

EZLynx ⬥ support@ezlynx.com ⬥ 877-932-2382 ⬥ www.ezlynx.com