

SMS Responder Bot Guide for Office Managers

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I. Introduction

The SMS Responder Bot allows users to program automatic replies in response to incoming SMS messages. To do this the bot works by responding to keywords. Upon receiving an SMS message with a recognized keyword, the Responder Bot will send an automatic reply with a pre-configured message. If the Bot receives a message that does not match any keyword, it may try to match the message contents to a name in your company's phone directory, and connect the sender to the corresponding person. The SMS Responder Bot also lets you see a history of messages for a number and gives users the ability to send messages from within. This guide will help you navigate, use, and configure the SMS Responder Bot.

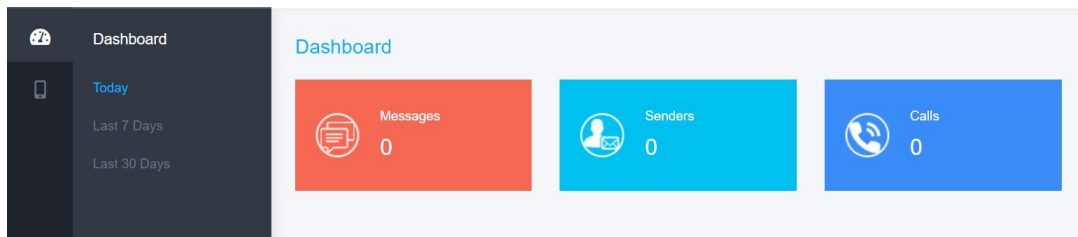
II. Login

Go to the SMS Responder Bot web URL provided by your provider and log in with your username and password. Upon successful login, you will be brought to the SMS Responder Dashboard.

III. Dashboard

The Dashboard for an Office Manager user shows you usage statistics for the SMS Responder Bot. The statistics shown are an aggregate value of the statistics of all the phone numbers in your domain and owned by all your customers. Your statistics, therefore, is an aggregate of all your users' statistics.

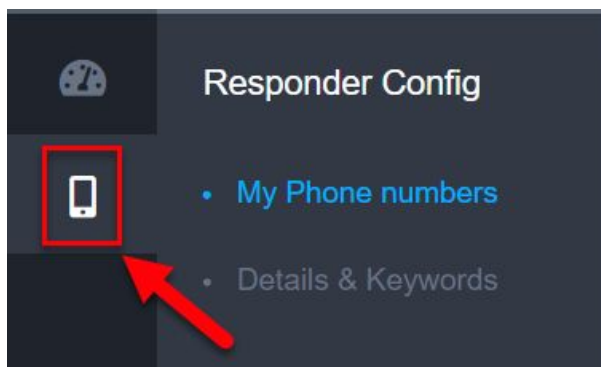
Use the items on the left navigation pane to show statistics for Today, Last 7 Days, or Last 30 Days.




IV. Responder Configuration

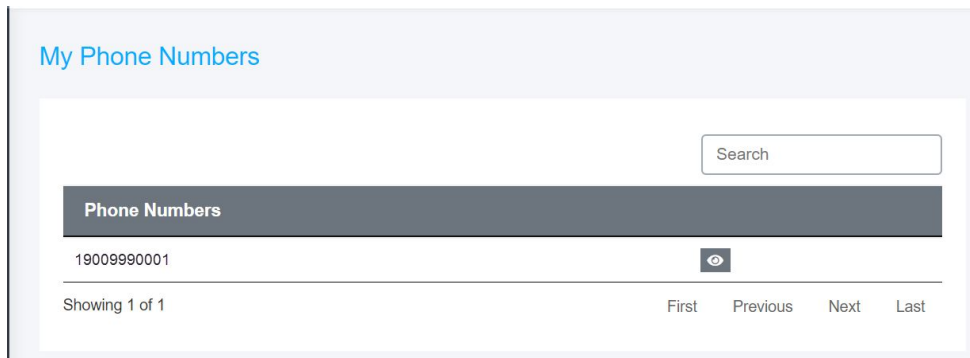
To manage the configuration settings for a phone number that has been set up with the SMS Responder Bot follow the instructions below.

1. Click on the phone icon on the left menu pane to see the list of phone numbers that are subscribed to the SMS responder application.



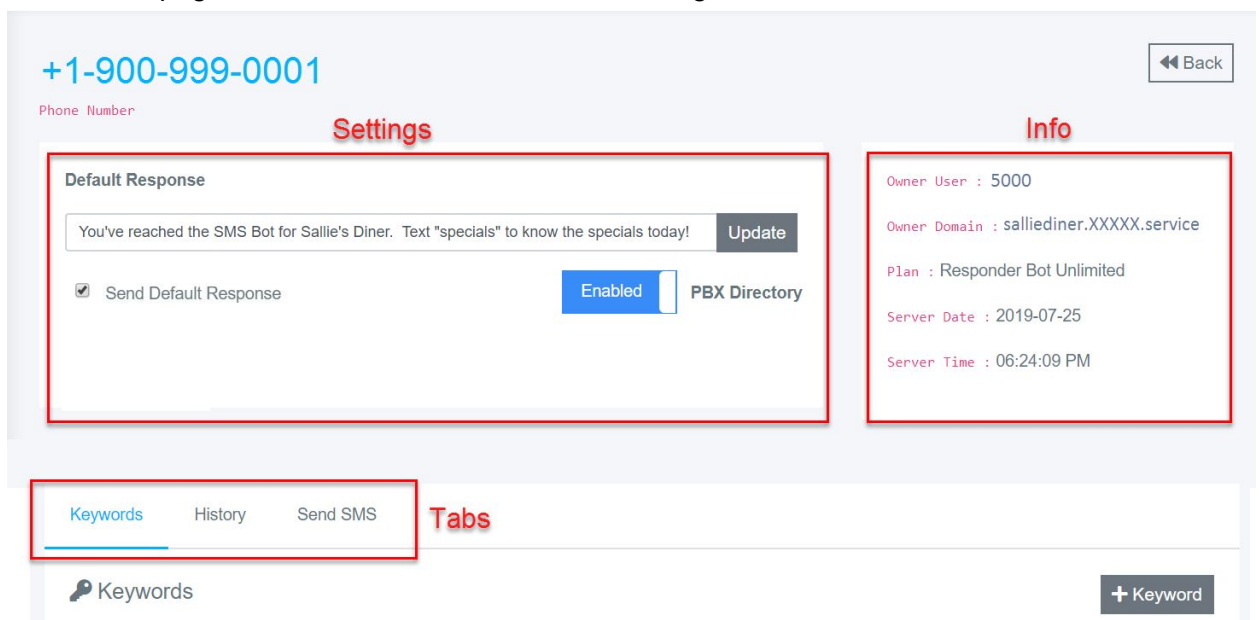
2. Click the Eye icon  beside the phone number that you would like to manage and you will then be brought to the Details page where you will see the settings and details

for the chosen number.



V. Details page

The Details page is divided into three sections: Settings, Info, and Tabs.



IV. A. Settings

In this section you can configure the following settings:

- **Default Response:** This is the default reply to an incoming message that does not match any keyword (discussed in the Tabs section) or name in the PBX Directory. Edit the Default Response text to best suit your business. **Tip:** Make this generic but not vague so that it will properly guide both old and new senders to your bot.
- **Send Default Response** checkbox: This is checked by default. By unchecking the box, you will disable the sending of the Default Response

when an incoming message does not match any keyword or name in your PBX directory.

- **PBX Directory** toggle button: This is enabled by default. When set to disabled, the bot will NOT search the PBX Directory for a matching name after it fails to match the sender's message to any set keyword.

IV. B. Info

This section shows details regarding the phone number and other relevant information.

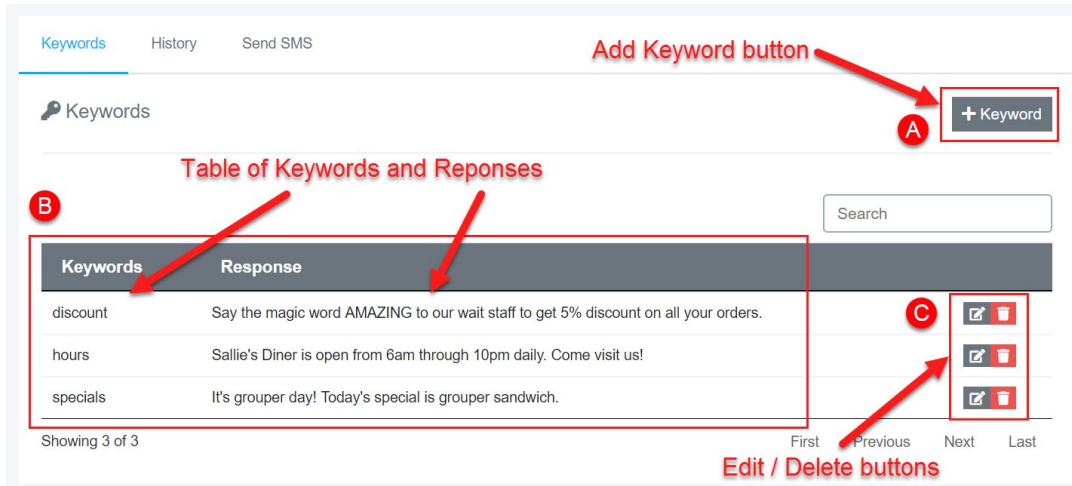
- **Owner User:** The identifier of the user owning the phone number.
- **Owner Domain:** The domain or organization. This string identifies the organization within the bot system.
- **Plan:** The plan to which the user who owns the phone number is subscribed to. When the user is subscribed to a specific plan, say Responder Bot 50, it will apply to all the phone numbers they own and this enables them to define up to 50 keywords for all of their phone numbers.
- **Server Date:** The current server date.
- **Server Time:** The current server time. The Server Date and Server Time together serve as a reference for the timestamps of the messages listed in the History tab.

IV. C. Tabs

This section at the bottom of the page contains three important tabs: Keywords, History, and Send SMS. These tabs will be discussed in detail in the following sections.

V. Keywords

This tab in the Details page is used to manage keywords for the bot. Incoming messages are evaluated for any matching keywords that you have set and if there is a match it will respond to the sender with the set response defined.



(A) Add a New Keyword

The Add Keyword button which when clicked will bring up the Add Keyword dialog used to configure a new keyword for the bot.

Add New Keyword
×

* Keyword

* Reply

Select Image (Maximum file limit: 10MB)

Choose File



 No file chosen

Cancel
Add

(B) Table of Keywords and Responses

This table shows all the defined keywords and the response text.

(C) Edit or Delete Keywords

To the right of each keyword and response is an Edit button  to change its configuration and a Delete button  to discard it.

(D) Search Box

You can enter a search term that will narrow down the displayed keywords and their responses if the search term is found in either.

VI. History

The History tab shows all the incoming messages to, outgoing messages from, and call actions for the phone number being managed. From here you can also initiate replies to a message and download the historical logs as a spreadsheet formatted file.

The screenshot shows the 'History' tab interface. At the top, there are tabs for 'Keywords', 'History', and 'Send SMS'. Below the tabs, there is a 'History' header with a refresh icon. A red box labeled 'A' highlights the date filter section, which includes 'From' (Jul 23, 2019) and 'To' (Jul 25, 2019) input fields, a 'Filter' button, and a refresh icon labeled 'B'. Below this, there is a 'Show 10 entries' dropdown, 'Excel' and 'CSV' download buttons labeled 'E', and a 'Search:' input field labeled 'C'. The main content is a table with columns: 'Timestamp', 'Source', 'Type', 'Message', and 'Reply'. The table contains four rows of message history. A red box labeled 'D' highlights the 'Reply' column, which contains reply icons for each message entry.

Timestamp	Source	Type	Message	Reply
Jul 25, 2019 02:44:49 PM	tel:19009991234	Outbound SMS	It's grouper day! Today's special is grouper sandwich.	↩
Jul 25, 2019 02:44:47 PM	tel:19009991234	Inbound SMS	specials	↩
Jul 25, 2019 02:43:35 PM	tel:19009991234	Outbound SMS	You've reached the SMS Bot for Sallie's Diner. Text "specials" to know the specials today!	↩
Jul 25, 2019 02:43:32 PM	tel:19009991234	Inbound SMS	hello	↩

(A) Date Filters

Set a From and To date and press the Filter button to show only messages within the dates chosen

(B) Refresh History

Clicking on the refresh button will show the latest incoming and/or outgoing messages.

(C) Search Box

Putting in a search term will narrow down the shown messages that contain the matching search term.

(D) Reply Buttons

Beside each entry is a reply button that can be used to send a reply to the message.

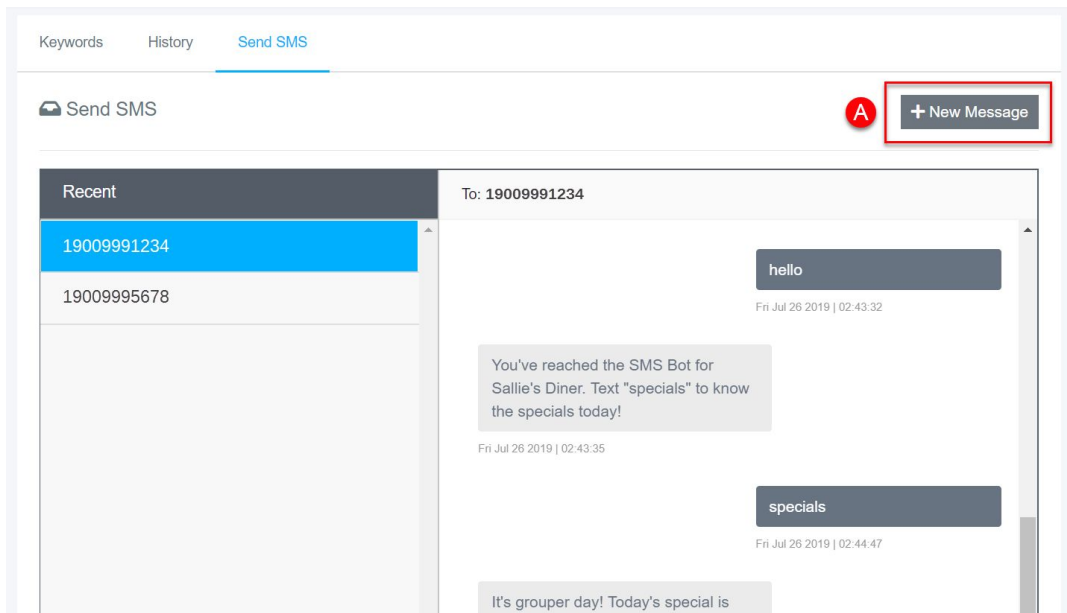
Note: This will open the Send SMS chatbox.

(E) Download Logs

The Excel or CSV buttons will initiate a download of the shown messages into a spreadsheet format file.

VII. Send SMS


The Send SMS tab can be used to send new messages or view previous conversations organized by the senders' phone numbers, which are shown on the left pane. The right pane displays the messages sent and received when a conversation is chosen by clicking on the phone number in the left pane.

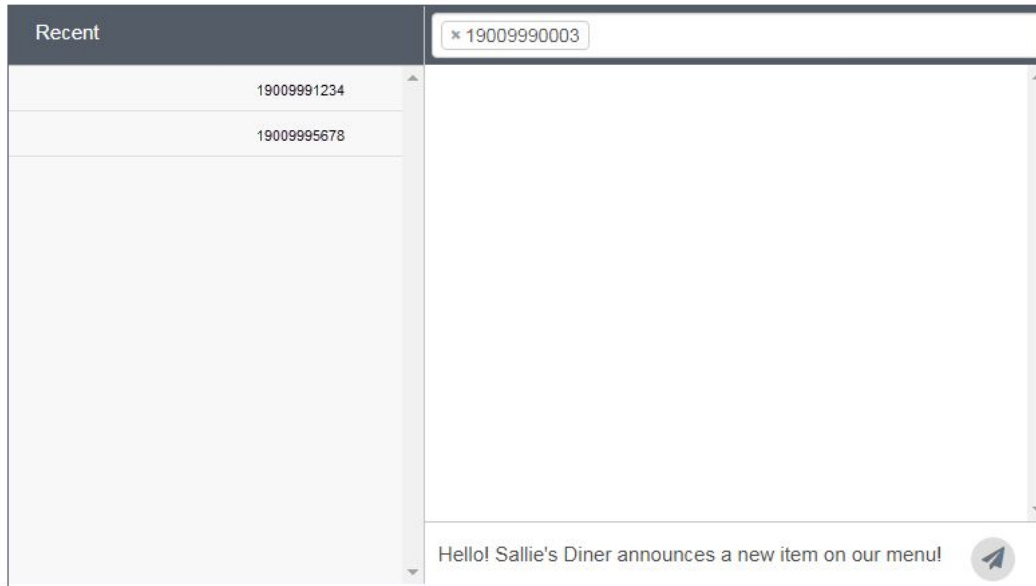


Tip: Seeing the conversation with the bot and the phone numbers will give you an idea of the quality of the responses. This may help you tweak your keywords and responses if you think the dialogue could be improved.

(A) Create New Message

The New Message button is used to send a message to a phone number not listed on the left pane. Write the destination number on the top input box and the message in the

lower input box and press the send button . The message you type will be sent via SMS to the destination number with the managed phone number as the sender.



VIII. Testing the SMS Responder

To test the SMS Responder, simply send an SMS message from your mobile phone to the phone number that the bot is assigned to. You should receive the default response that you configured in steps above.

IX. Logging Out

You can log out from the SMS Responder Bot by opening the drop-down menu beside your avatar icon and clicking on the Logout button.

