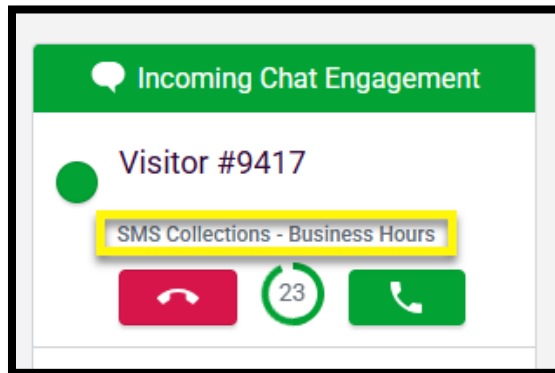# SMS – Texting Do's and Don'ts

What does texting look like?

Texting shows up as a chat. You can tell it is a text by the name of the listed queue.

You can accept up to two (2) SMS (texts) at a time. However, if you need to focus on a single member, set your status unavailable to prevent additional chats/SMS messages from coming in.
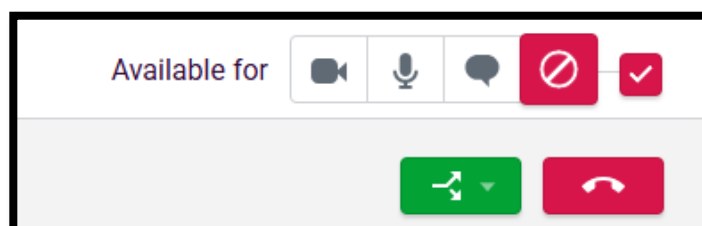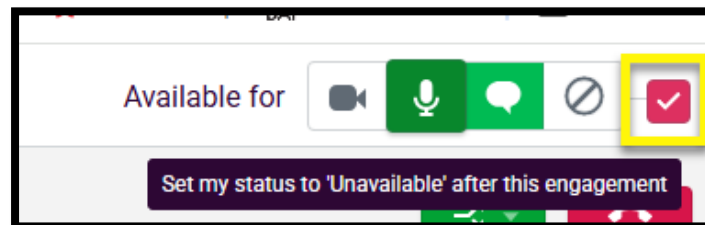
For Two (2) Engagements:

If you are only engaging with one member and can accept a second, this is what your availability should look like.
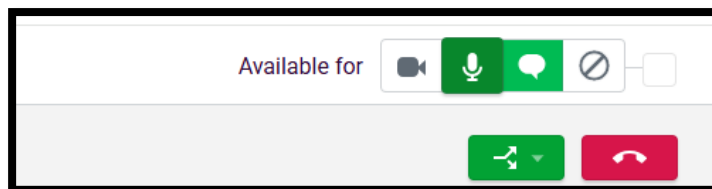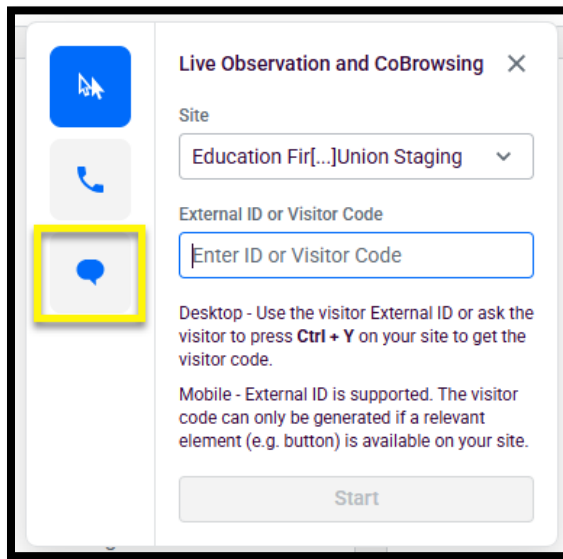

For One (1) Engagement:

If you need to focus on a single member, select the empty box on the side. This will make you unavailable for any other engagements.
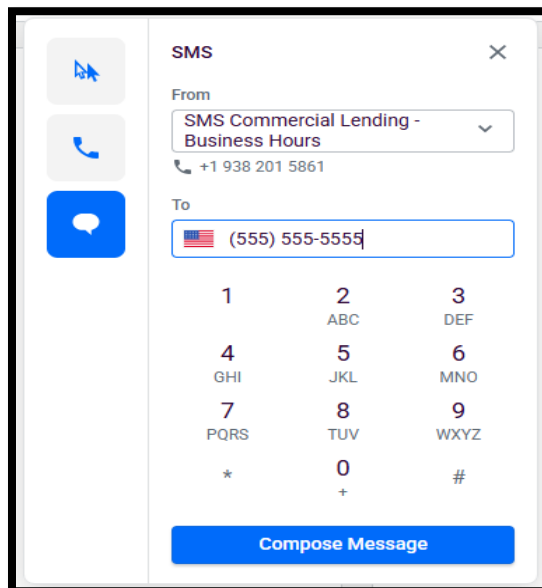
Sending an SMS (text)

1. Click the waffle
2. Select the chat bubble

3. Your site should already be determined by the queue that you are in.
4. Enter the phone number you are sending an SMS to and press "Compose Message"

5. This will start the engagement. The member will not know you have started this engagement with them until you text them.

How do I find my SMS messages?

1. Select the Engagement Explorer from the list of options under the hamburger.
2. From the options, choose the queue you are looking for.
   a. Ex. If you are in Collections, you would choose the queue that says SMS – Collections Business Hours.
3. Look through your list of visitors
4. Select the engagement you are searching for.
5. From that engagement you can select the small chat bubble from the visitor information to start the SMS (texting) session back up.

6. Once you have selected the chat bubble by the members phone number, it will show the waffle icon expanded and have you select "Compose Message".

TEXTING DOs and DON'Ts

Examples:

SMS (texting) Do's	SMS (texting) Don'ts
DO -use professional language	DON'T – use slang or abbreviations
DO – verify you are texting the right person	DON'T – send sensitive information
DO – Use proper punctuation and grammar	DON'T – over message the member
DO – Protect sensitive information	DON'T – type in all caps
DO – keep messages clear and concise	DON'T – make assumptions

1. Sensitive Information Safety

✅ **GOOD:**

"For your security, please don't send personal info through text. I can guide you through the next steps."

❌ **BAD:**

"Just text me your full SSN and account number."

2. Correct Grammar & Punctuation

✅ **GOOD:**

"I can submit that request for you now. Is there anything else you'd like help with?"

❌ **BAD:**

"K got it anything else u need

3. Professional Language

✅ **GOOD:**

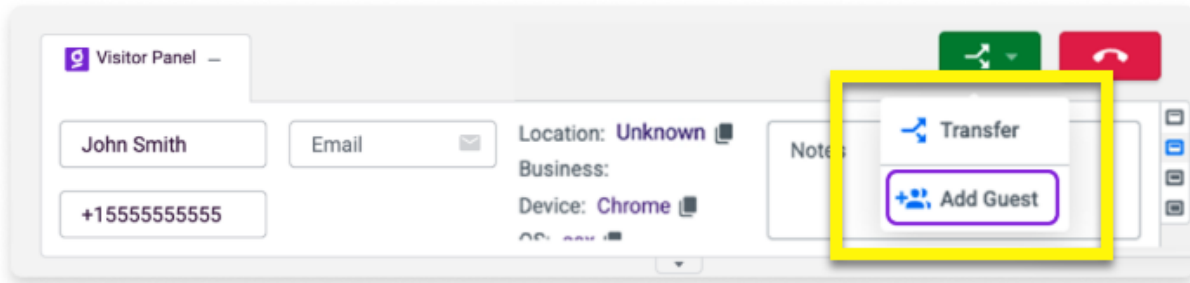"I'm happy to look into this for you."

❌ **BAD:**

"Hang on, let me figure out what's going on with this mess."

HOW TO TRANSFER IN GLIA

There are 2 types of transfers:
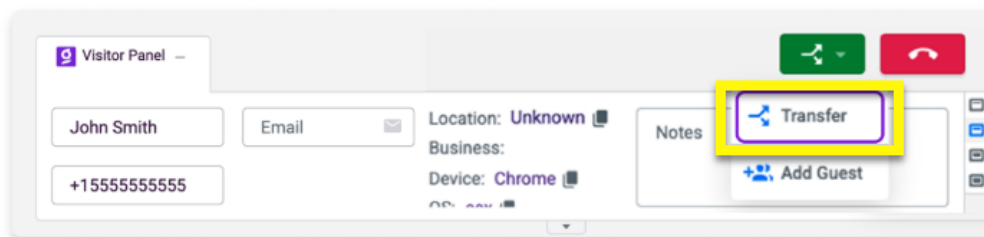
- Cold (Transfer)
- Warm (Add Guest)

Which transfer should I use?

- **Transfer** (known as a cold transfer) should be used when transferring to a queue or a branch.
  - *Ex. " I need to speak with someone in the collections department", you would transfer directly to that queue.*

- **Add Guest** (known as warm transfer) should be used when consulting with another individual when a member is one phone.
  - *Ex. James called in and is talking to Beth. James has been working with Susan in mortgage but has not been able to get in touch with her. Beth chooses Add Guest, to consult with Susan about James.*

HOW TO PERFORM A COLD TRANSFER:

1. Select the Transfer option

2. Select the queue you with to transfer to

3. Once you select "Send to Queue" the call is transferred to the selected queue.

HOW TO PERFORM A WARM TRANSFER:

1. Select Add Guest option

2. Select from the list of operators. (You can search for who you need to speak with)
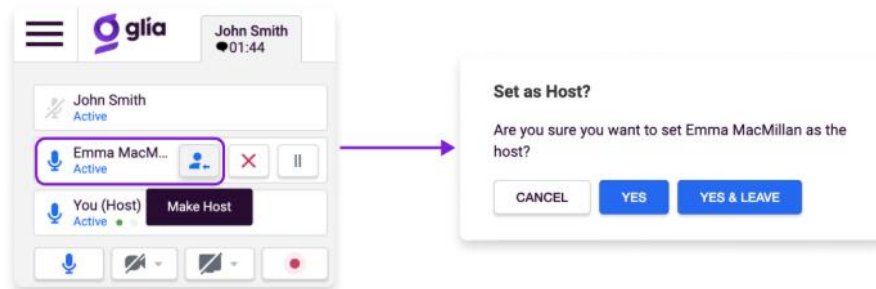
3. You will see the operator listed as part of the active call. This will put your member on hold.
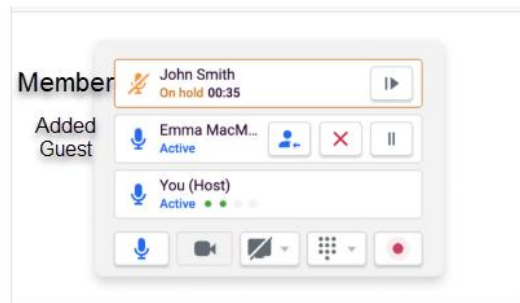
4. Once you are done consulting with the added guest and you are ready to transfer the member, select the "Make Host" button.

LIGHTNING MESSAGES

Remember, you can customize up to 15 messages that are quick sends to members during chat engagements. *The two (2) below are highly encouraged and recommended by management.*

1. *Here is the link to share your file(s) with me. Please make sure you include your name and email address. (add your department/branch) Share File link here.*

2. *Hi, I'm {operator_first_name}. How can I help you today?*

Common Lightning Messages

- Hello, I am {operator_first_name}. How can I help you today?
- I see that you are looking at our loans, could I get an application started for you?
- Did you need some help with our website?
- Thank you! I hope you have a wonderful day!

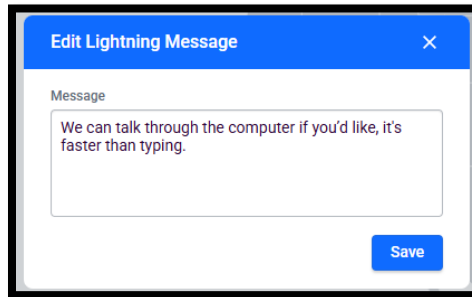| Lightning Message Do's	Lightning Message Don'ts
DO -use professional language	DON'T – use slang or abbreviations
DO – verify you are texting the right person	DON'T – send sensitive information
DO – Use proper punctuation and grammar	DON'T – over message the member
DO – Protect sensitive information	DON'T – type in all caps
DO – keep messages clear and concise	DON'T – make assumptions

How To Edit Lightning Messages

1. Click your profile icon
2. From the window, scroll down to the lightning messages.
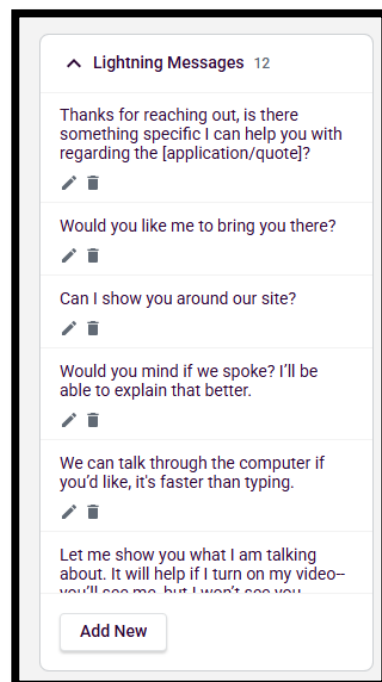
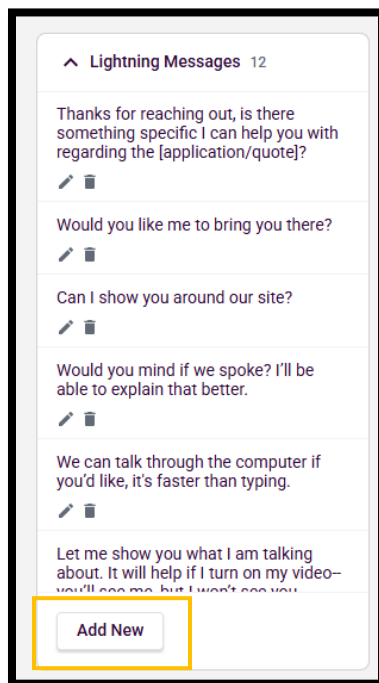3. Select the pencil icon under the message that you wish you edit.
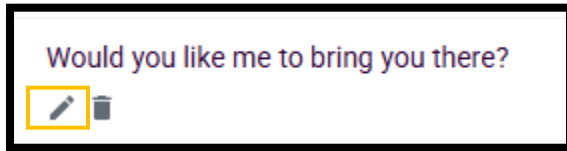
4. The lightning message will pop up for you to make any changes.

5. Select save. Your message will be updated and saved.

How to Add Lightning Messages

1. Select your profile icon
2. From the window scroll down to the lightning message

3. Click Add new
4. A box will pop up for you to add your new message. Once you click save, the message will be stored.

Using Variables

There are a few variables that can be added to your messages. If these are added, they will fill in the information based on the variable.

- {operator_first_name} - First name of the user
- {visitor_first_name} - First name of the visitor
- {day_of_week} - Current day of the week, e.g. Friday
- {month} - Current month, e.g. October