FIESTA TAX SERVICE

Textellent Activation

Table of contents:

Section 1: Textellent Activation

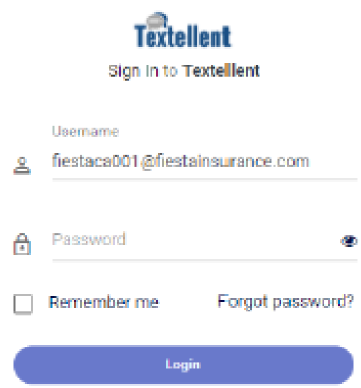
<u>Username and Login</u>

Client Login Portal – www.textellent.com

To Activate Owner Login

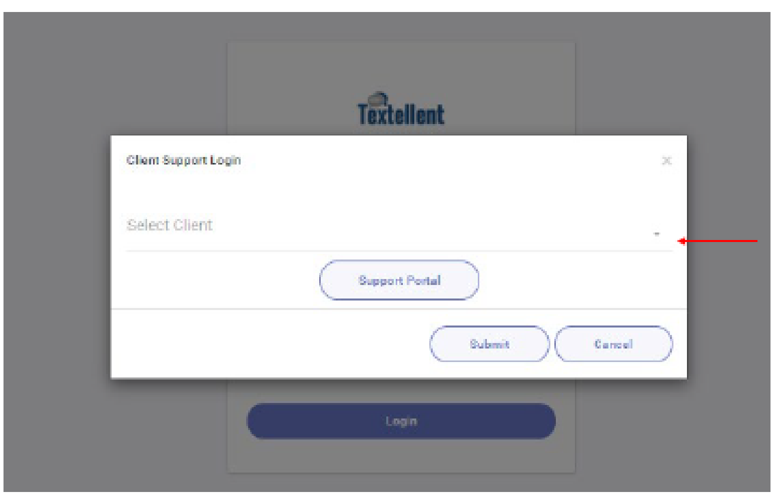
1. Your log in Username will be your Fiesta location email address (example)

- fiestaca001@fiestainsurance.com
- fiestafl001@fiestainsurance.com



Login Portal

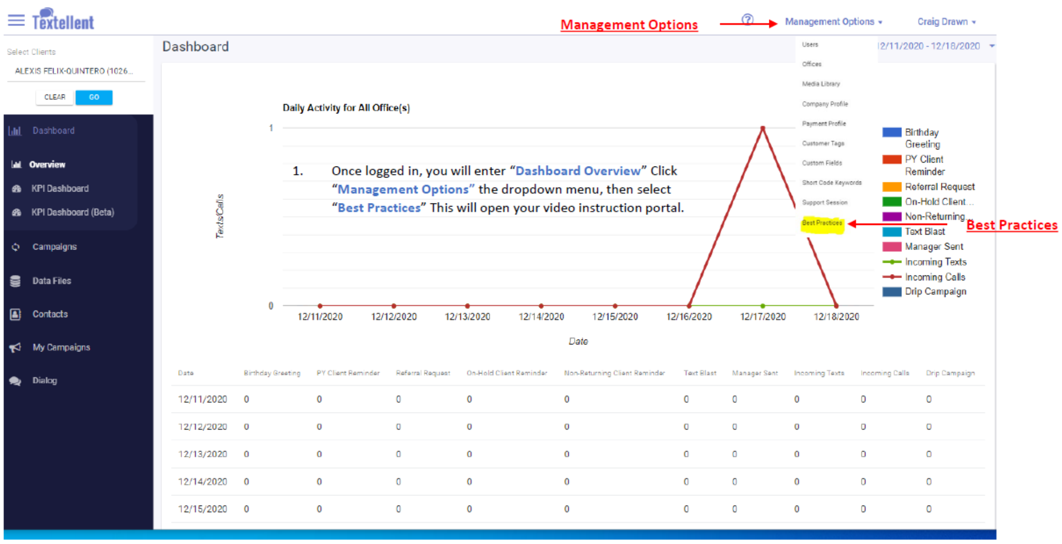
Multi-Units Owners will have a Separate login for each location



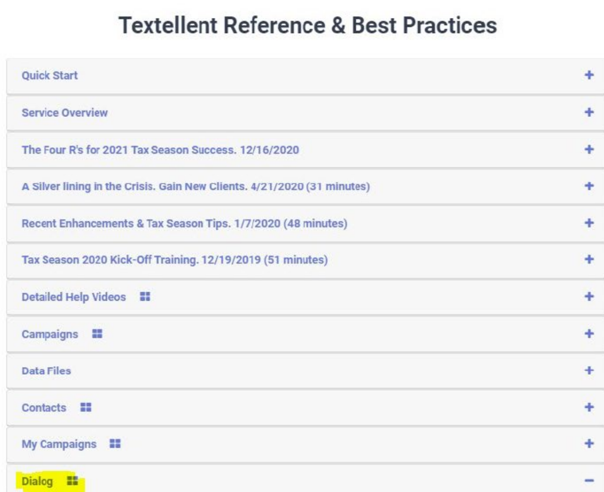
Once logged in select your location Number and click submit

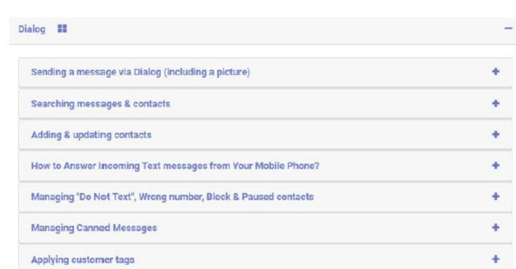
Best Practice Videos

Once logged in, you will enter “Dashboard Overview” CLICK “Management the dropdown menu, then select “Best Practices”. This will open your video instruction portal.



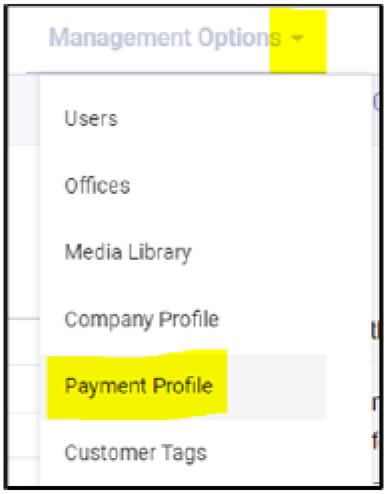
Click “Dialog Tab” and you will be prompted to (7) Instructionals.





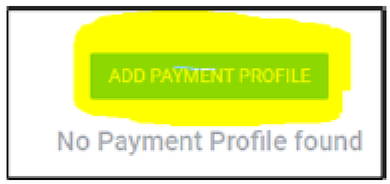
Step by Step Instructionals

Adding a Credit Card to Your Textellent Account

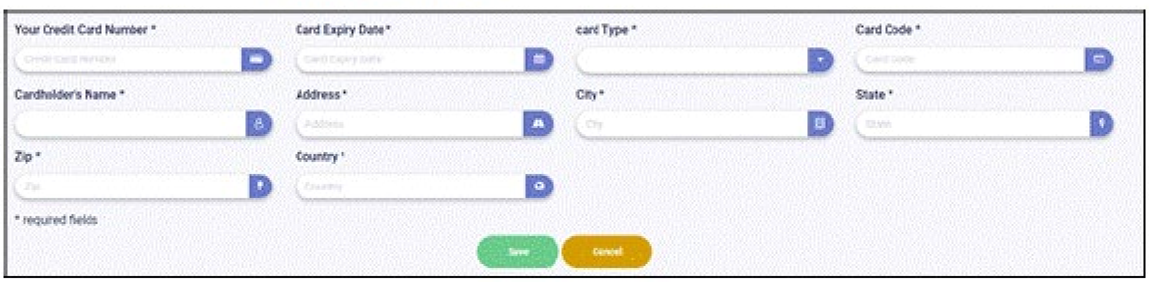


Once logged in, select the "Management Options" dropdown menu, then select "Payment Profile".

Click the "Add Payment Profile" button.



Enter in all required (*) Credit Card information and click the green "Save" button.



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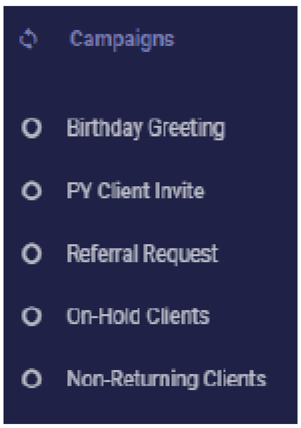
Manage and Monitor campaigns

5 Pre-Set Campaigns

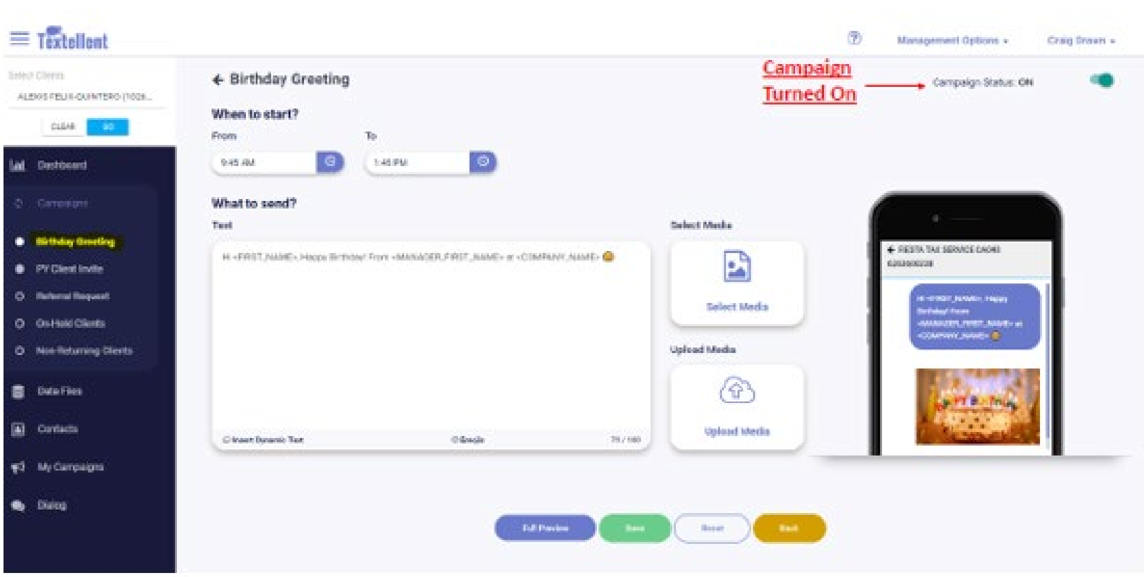


These Campaigns Will Run Automatically

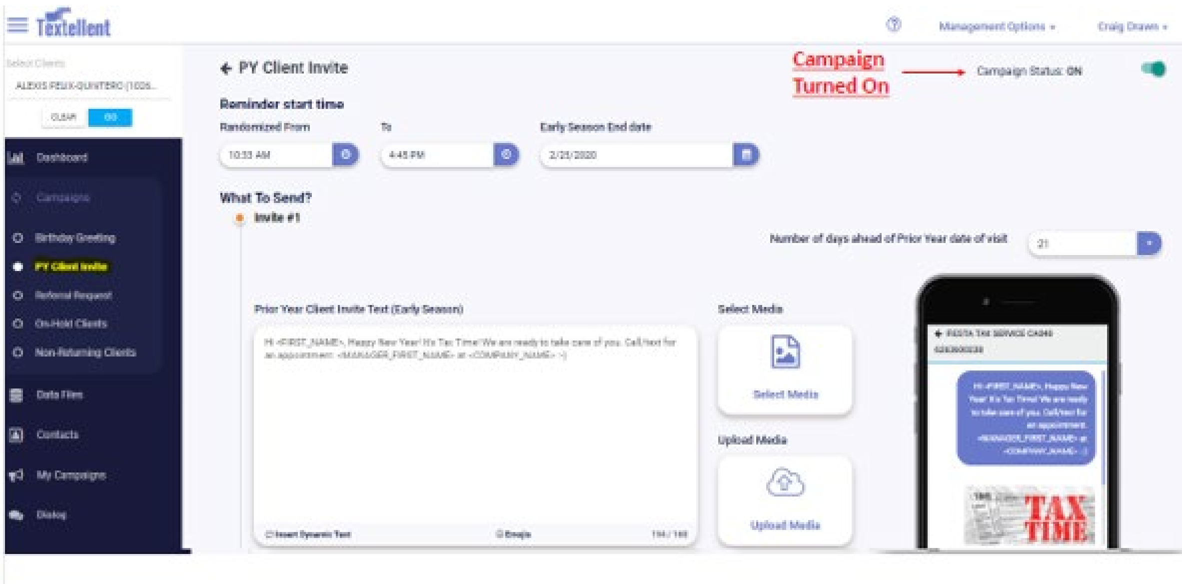
ACTION REQUIRED

Turn On ALL Campaigns

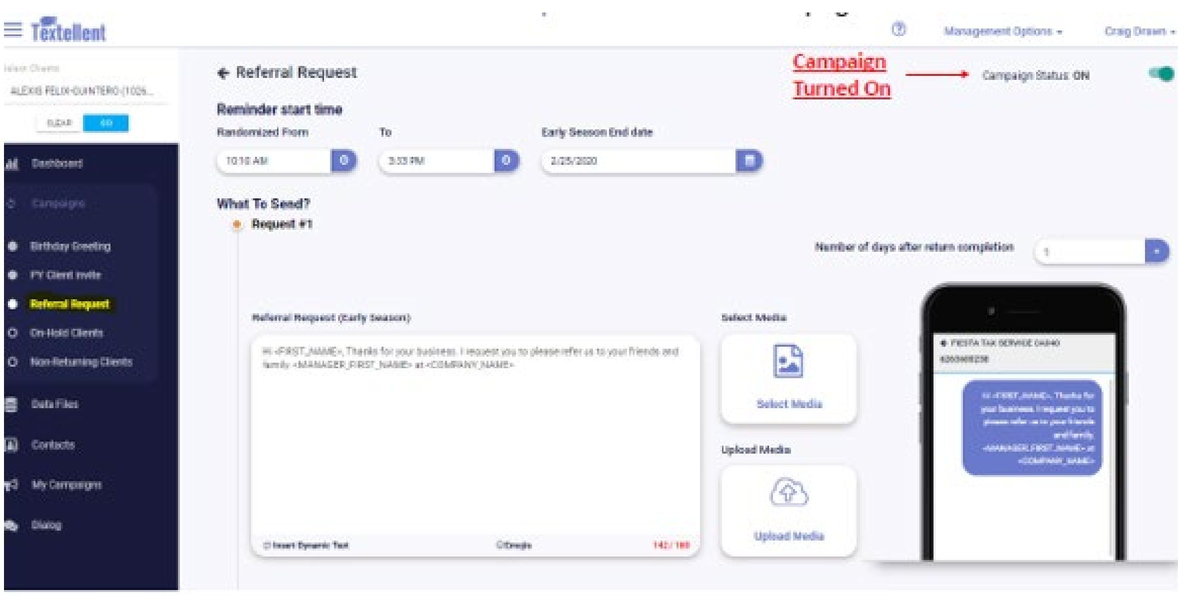
*In the Menu click **Birthday Greeting** and turn on the campaign



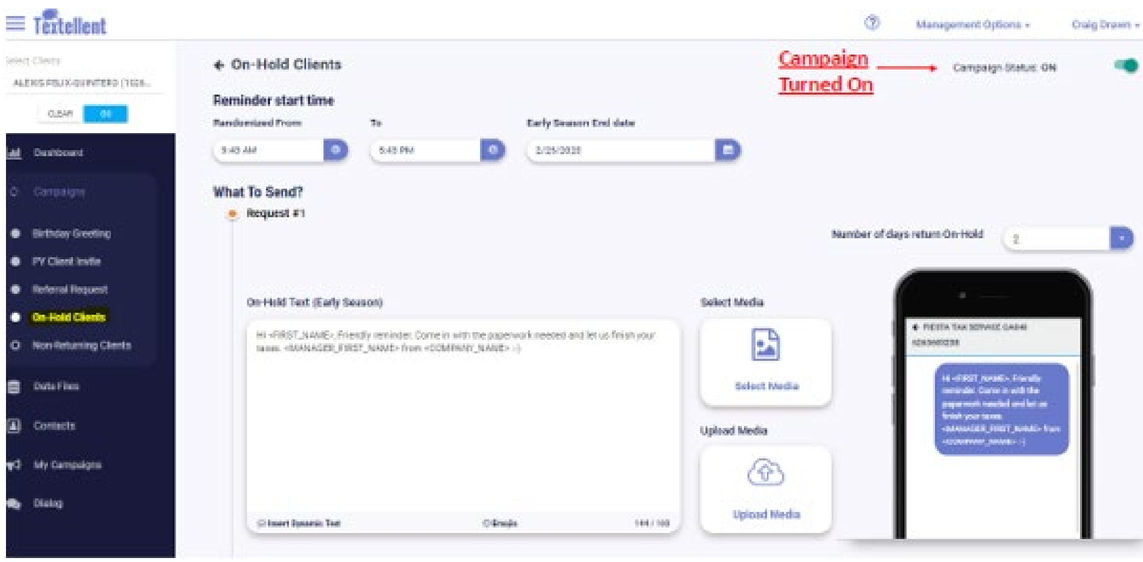
*In the Menu click **PY Client Invite** and turn on the campaign



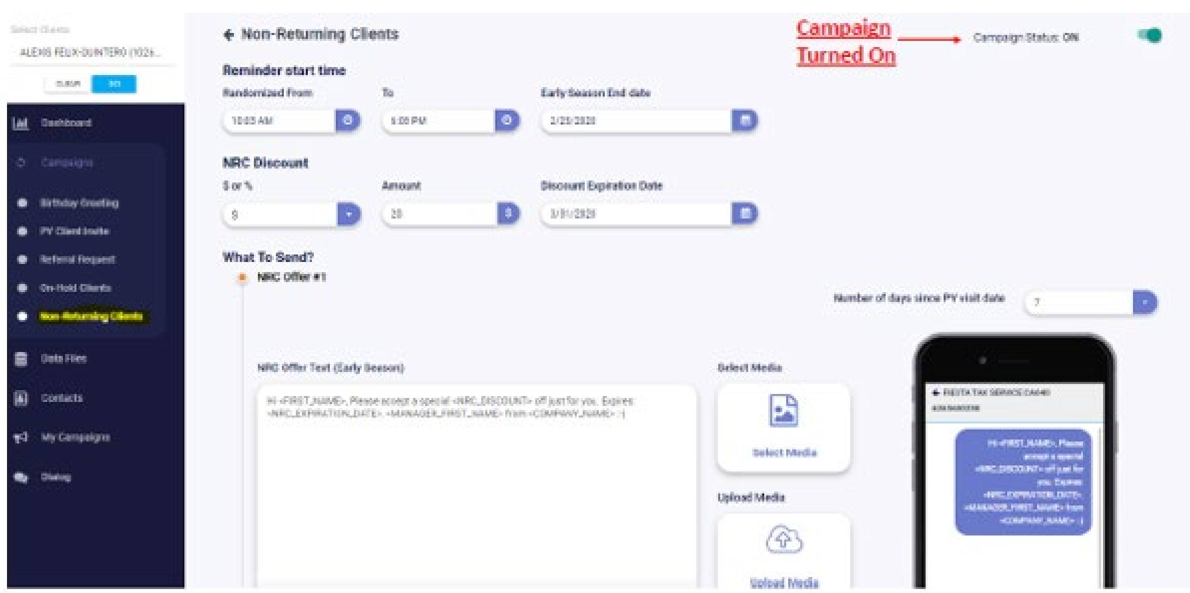
*In the Menu click **Referral Request** and turn on the campaign



*In the Menu click **On-Hold Clients** and turn on the campaign



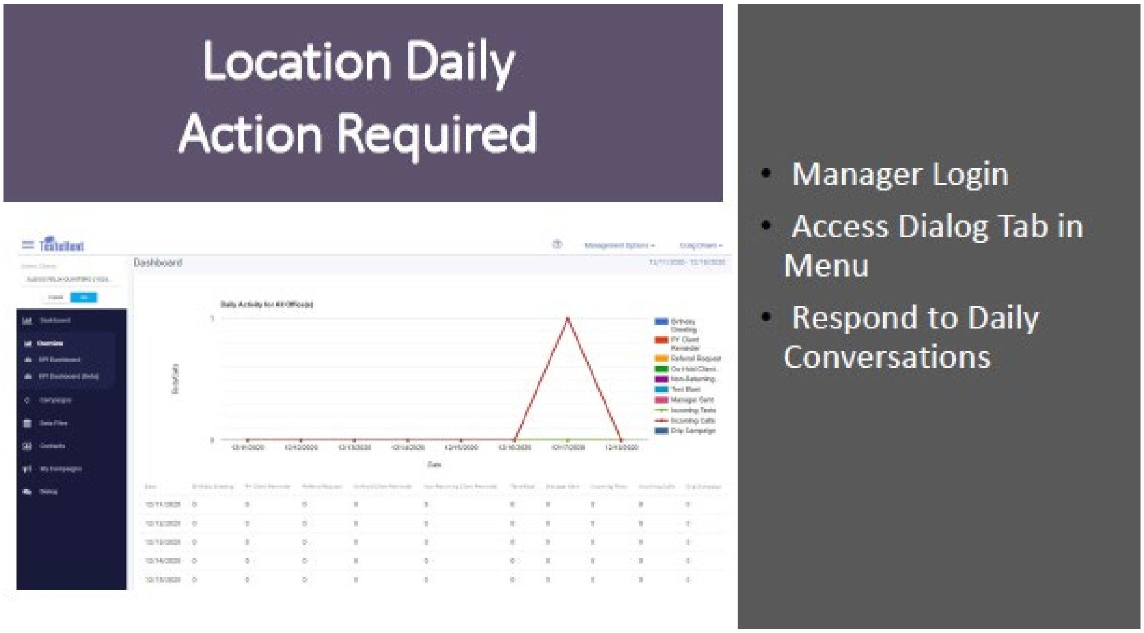
*In the Menu click **Non-Returning** and turn on the campaign



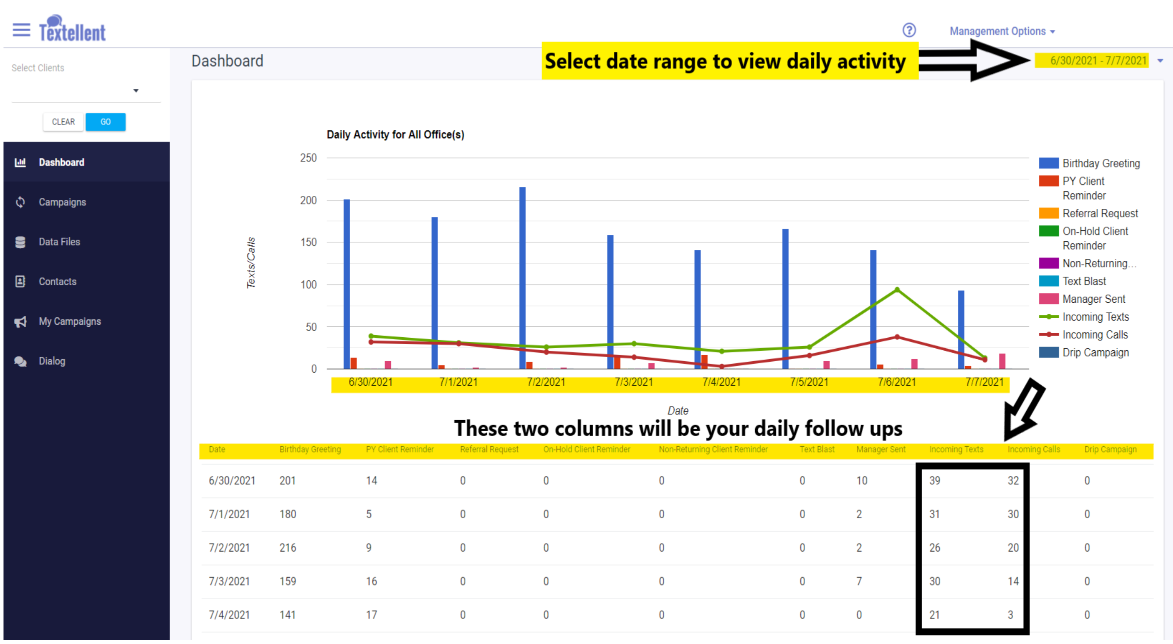
Best Practice Text Responses

1. Respond to ALL incoming texts as soon as possible, even if it is "you are welcome Jeff". And include their names in your responses as much as possible. A prompt response, particularly one that includes the client's name leaves a great impression.
2. IMPORTANT: Your replies will automatically go to the customer who sent you the last text message. To send a text to anyone other than the last person who sent you a text, put the 10-digit phone number before the message. Example: "4084971220 Hi there" will cause a text to (408) 497-1220 saying "Hi there".
3. Use texting for not only marketing but also for informational, customer service messages. Encourage your clients to text you. Add the Textellent phone number to your business cards. This will create a higher customer satisfaction and result in lower call volumes in the office.
4. If someone replies with a "wrong number," do not reply back or send any more text messages to that number. Instead, you should immediately execute the "C wrong" command.
5. If you run multiple offices, try and delegate the responsibility of replying back to incoming texts or else you may fall behind. Train the staff well and emphasize the importance of replying to each incoming text. They must not see this as a hassle or chore but rather a novel and cool way for getting a deeper, more personal connection with the clients. And like anything involving delegation, "inspect what you expect". Check on the Dashboard the number of "incoming texts" and "manager sent" every few days to make sure they are responding to incoming texts effectively.
6. Reminder: If you have two incoming texts, your reply will automatically go to the number from which the last text came in. In order to reply to a previous text, include phone number as the first thing in your text, followed by the actual text message.
7. The cell phone that receives the incoming texts, should be left on at all times (even though on silent during nights). This will allow you to see the time when a text came in. If you shut down the phone overnight, all the texts from the previous night will come in at once and you won't know when it was originally sent.
8. Do not use special "emoticons" like the iPhone or Android smiley face. These are not compatible with each type of phone and sometimes get corrupted during transmission. Instead, use their text equivalent like :-) or ;) and use them a lot. Hopefully, the clients will see your smiles through your texts :-)

Location Daily Task

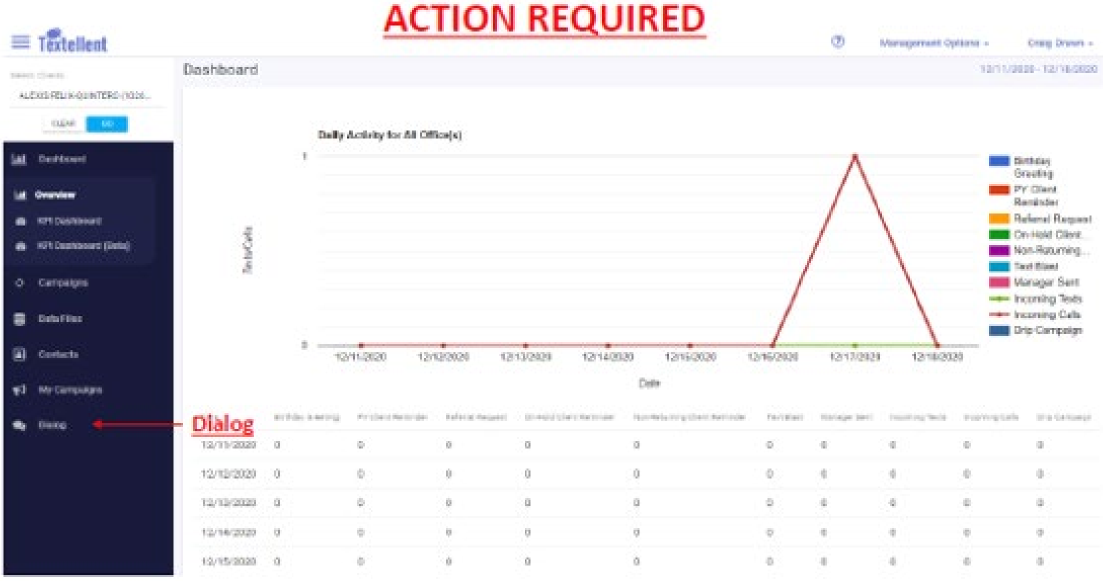


1. To monitor campaigns, text blasts, incoming calls & incoming texts, you will become familiar with your log in dashboard. You can select any date range from day to day, to weekly or monthly.



2. Access the “DIALOG” Tab to begin engaging with customers

ACTION REQUIRED



3. To respond to TEXT – CLICK on incoming text to respond to your client.

ACTION REQUIRED

4. Once the pop-up window appears you will enter your response to engage with client and then click “SEND”.

ACTION REQUIRED