



# **Exigo Messaging: AutoResponders and Broadcasts**

v 1.0

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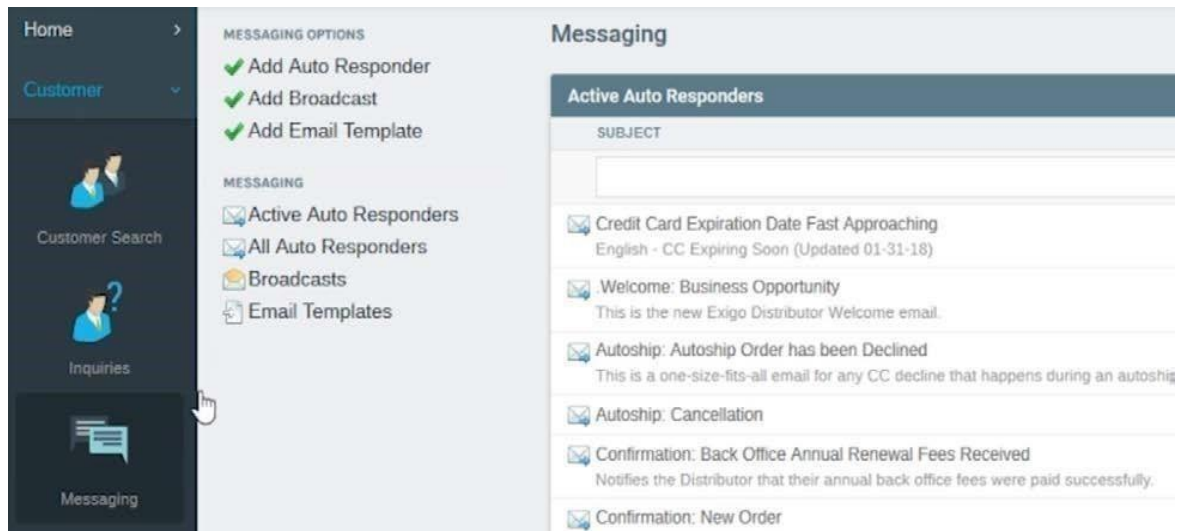
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## Exigo Messaging

There are three components to the Messaging System that can be used by the Client to send email and/or SMS correspondence to their customer base: **Auto Responders**, **SMS Messaging**, and **Broadcast Emails**.

Messaging is found under **Customer > Messaging**

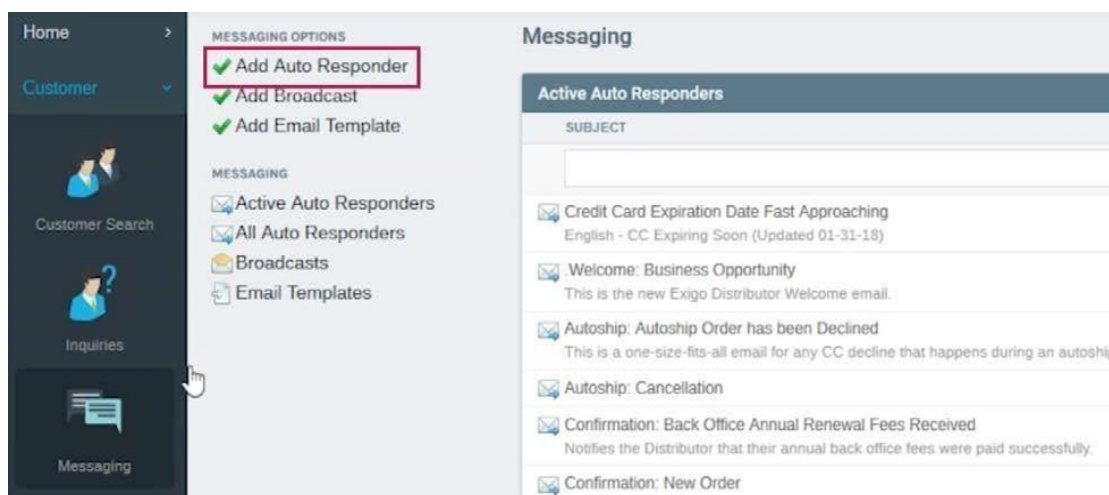
\*Auto Responders may be emails and/or SMS messages.



## Auto Responders

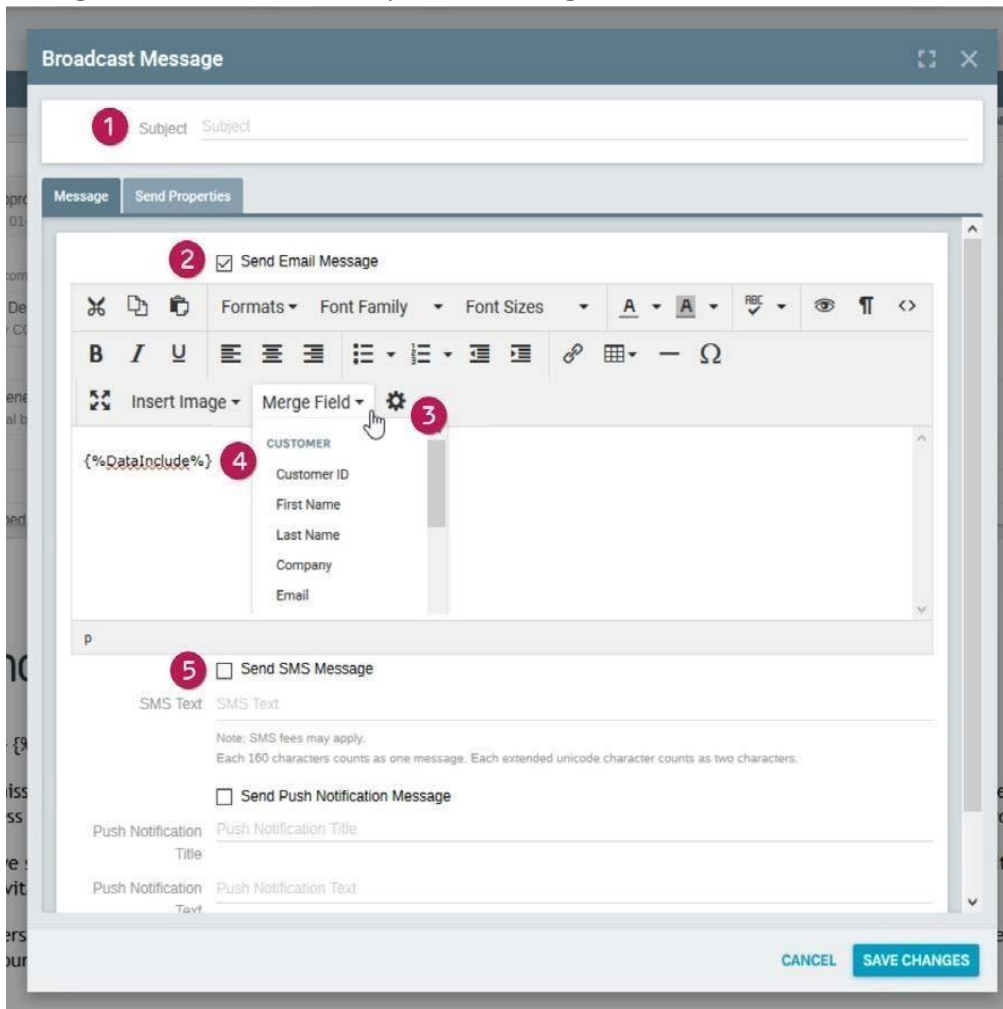
Auto Responders send emails/texts based on event triggers.

To create a new Auto Responder, click on “Add Auto Responder”.



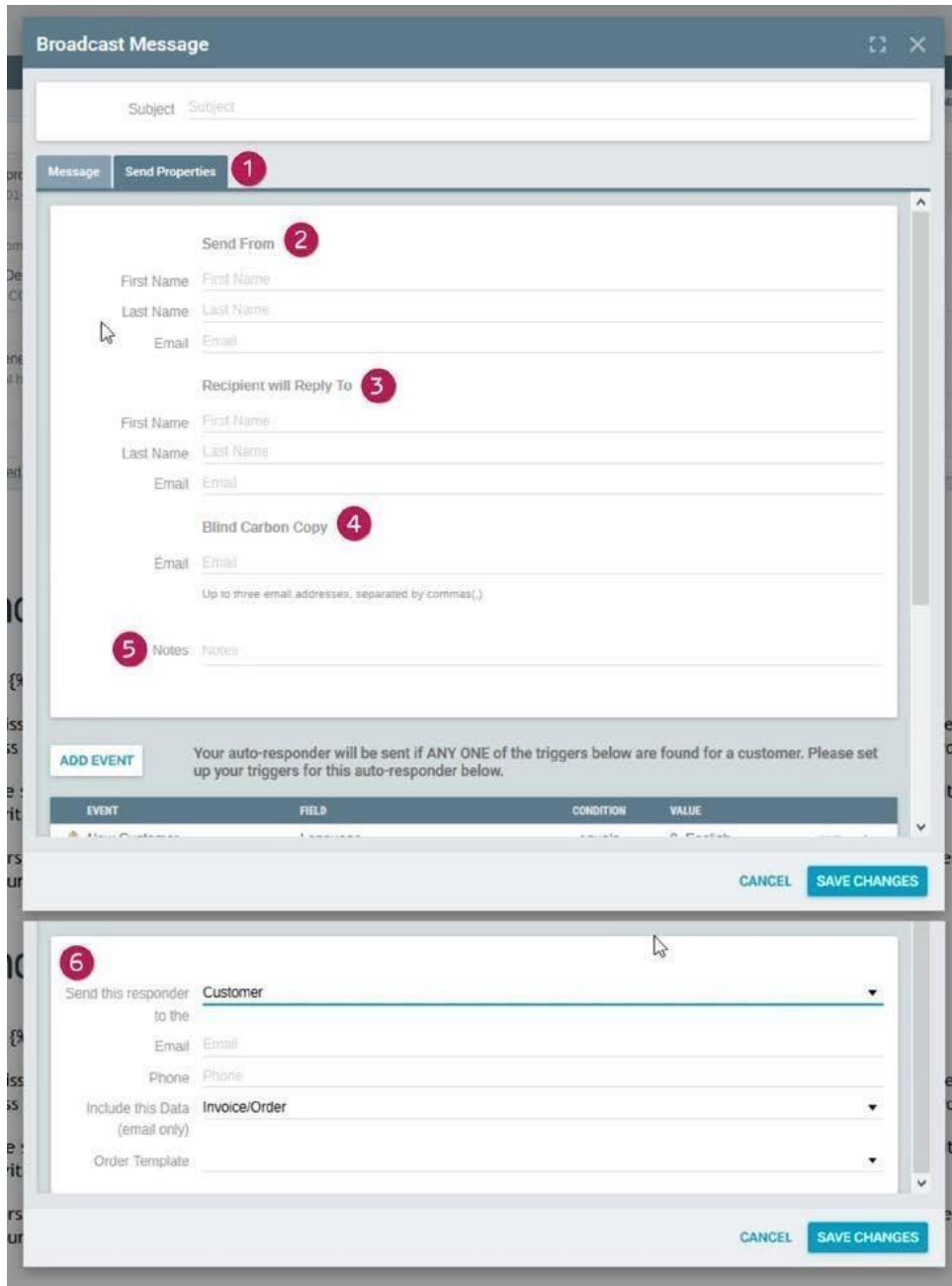
This will open a new window where you can designate a template (if you have previously created one) or blank broadcast to begin to create your Auto Responder message. In this example, we are using Blank Broadcast.

Clicking on “Blank Broadcast” will open the following window.



1. **Subject** – All Auto Responders must have a Subject.
2. **Send Email Message** – Check this box if you wish for the Auto Responder to be sent via Email to the customer.
3. **Tool Bar** – An outgoing message may be created utilizing a WYSIWYG toolbar with the ability to add merge fields, basic formatting, hyperlinks, images, and use HTML editing mode.
4. **Message Body** – Utilizing the Tool Bar in #3, this section allows the user to create the body of the message to be sent. The section allows the Invoice to be included in the email. Note: The {%DataInclude%} field must be present in the message body in the location you want the Invoice to be imbedded.
5. **Send SMS Message** – Check this box if you wish for the Auto Responder to be sent via SMS to the customer. **Note that there is a separate Message Body for SMS. SMS message bodies have a limit of 160 characters.**

## Send Properties



The screenshot shows a 'Broadcast Message' configuration window. The 'Send Properties' tab is active, indicated by a red circle '1'. It contains several sections: 'Send From' (with fields for First Name, Last Name, and Email, marked with a red circle '2'), 'Recipient will Reply To' (with fields for First Name, Last Name, and Email, marked with a red circle '3'), 'Blind Carbon Copy' (with an Email field, marked with a red circle '4'), and 'Notes' (with a text area, marked with a red circle '5'). Below these is an 'ADD EVENT' button and a table for triggers. The 'Send To' section (marked with a red circle '6') includes a dropdown for 'Send this responder to the' (set to 'Customer'), 'Email', 'Phone', 'Include this Data (email only)' (set to 'Invoice/Order'), and 'Order Template'. Both sections have 'CANCEL' and 'SAVE CHANGES' buttons.

1. **Clicking on “Send Properties”** allows you to specify the rules on who will receive the Auto Responder.
2. **Send From:** This section specifies the First Name, Last Name, and Email of the “Send From” account. This information will display on the message sent to the customer. For this reason, Clients often enter a generic name rather than an actual User Name.

3. **Reply To:** This section specifies the First Name, Last Name, and Email of the person who will receive any replies to the Auto Responder emails.
4. **Blind Carbon Copy:** This section allows entry of up to 3 email addresses which will be copied on the Auto Responder. It is recommended that the Client copy at least one address so that all Auto Responders are saved for audit purposes. Multiple entries should be separated with a “,” comma.
5. **Notes:** This section allows entry of a note to explain what the Auto Responder is for. Note that this will show in the List.
6. **Send To:** This section allows the email to be sent to a specific email address, customer, customer’s upline, enroller or sponsor. (NOTE: upline, enroller and sponsor email requires recipient to be double opted in)

**a. Double Opt In can happen in one of the follow ways:**

- i. Click on subscribe link in email
- ii. Distributor agrees to future communication from Client during acceptance of the Terms and Conditions.
- iii. Distributor logs in to back office
- iv. Single opt in done on Customer’s behalf in the email section of Customer summary screen.
- v. Event Triggers
- vi. Auto Responders are triggered by Events in Exigo. An example of an event is the Shipment of an Order. You may define the triggers by Clicking on “Add Event”.

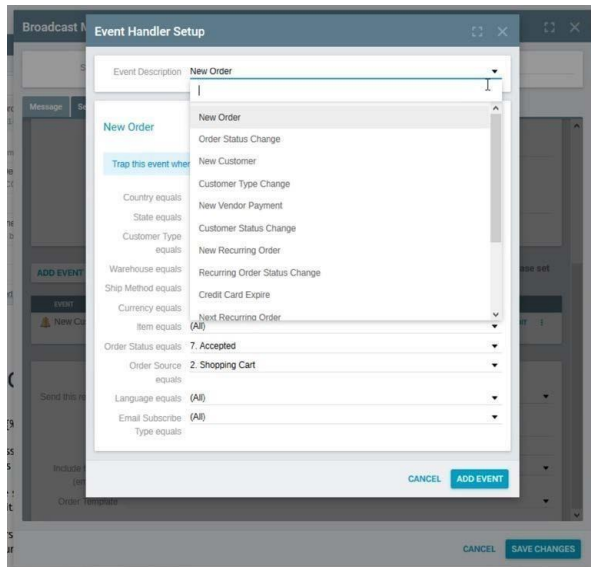
ADD EVENT

Your auto-responder will be sent if ANY ONE of the triggers below are found for a customer. Please set up your triggers for this auto-responder below.

EVENT	FIELD	CONDITION	VALUE	
🔔 New Customer	Language	equals	0. English	EDIT ⋮
	Customer Status	equals	1. Active	

## Event Triggers

Clicking Add Event opens the following window:

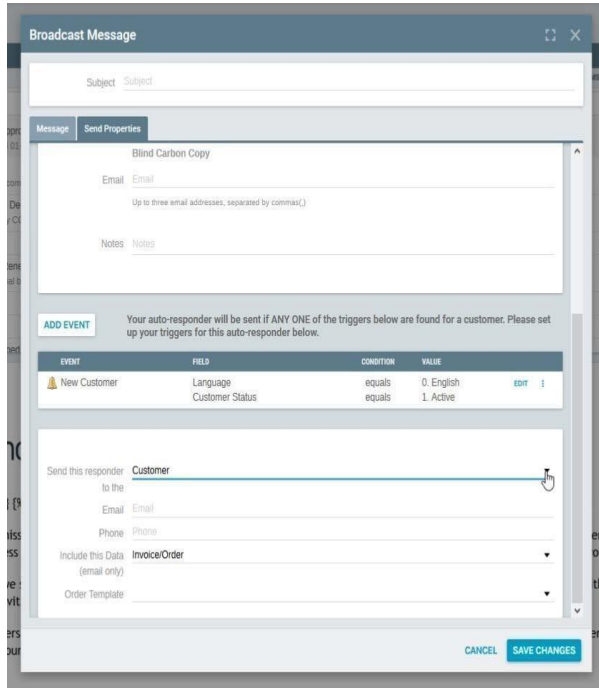


One or more Events may be chosen from this list. Examples are given below:

- **New Order** – Every time a new order is placed by a customer
- **Order Status Change** – Commonly used when an order is shipped (i.e. status changes from Printed to Shipped).
- **New Customer** – Every time a new customer record is created
- **Customer Type Change** – May be used when going from retail customer to a distributor.
- **New Vendor Payment (Commission Payout)** – May be used to communicate that a payout of commissions has been made.
- **Customer Status Change** – May be used when a Customer’s status changes from Active to Inactive.
- **New Recurring Order** – Every time a new recurring order is created.
- **Recurring Order Status Change** – May be used to address an auto ship that has gone from active to deleted.
- **Credit Card Expire** – May be used to notify a customer of a credit card on file that is nearing expiration
- **Next Recurring Order** – May be used to advise the customer of an upcoming autoship.
- **Subscription Expiration** – May be used when a subscription is nearing or at expiration.
- **Rank Change** – May be used to congratulate a distributor on an upgrade in rank.
- **Credit Card Batch Charge Decline** – May be used to address an autoship payment method that has been declined.
- **Custom Event** – These events may be custom programmed to the Client’s specific rules.

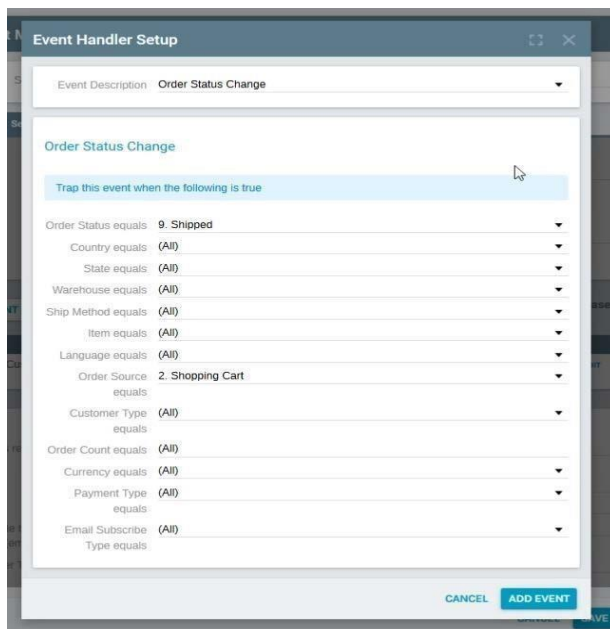
## Additional Information

- Individual Events are treated as “OR” statements to each other – any one of them being true will cause the responder to fire.



EVENT	FIELD	CONDITION	VALUE	
New Customer	Language	equals	0. English	EDIT
	Customer Status	equals	1. Active	

- Event Definition Triggers are “AND” statements to each other – all of them must be true to make the responder fire.

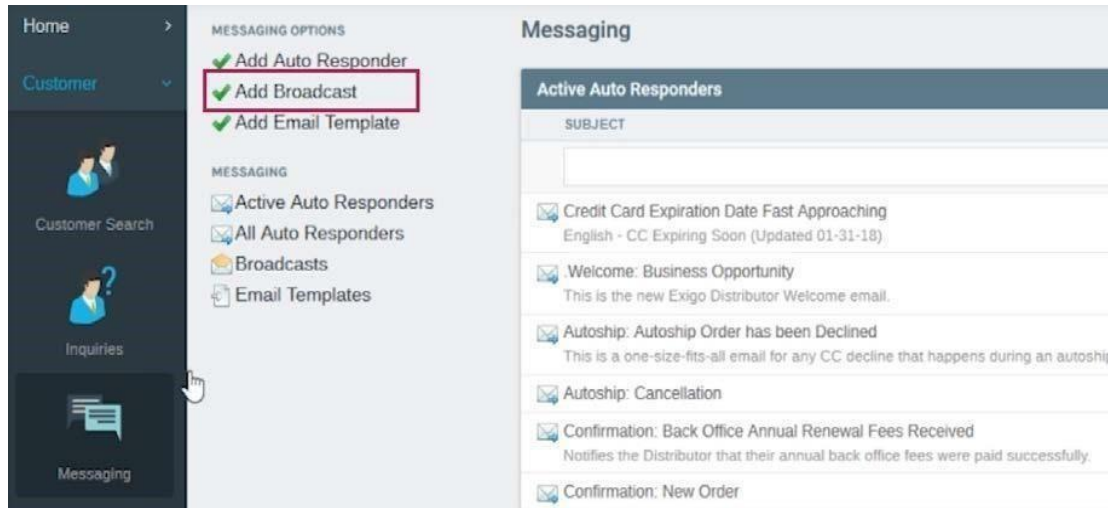




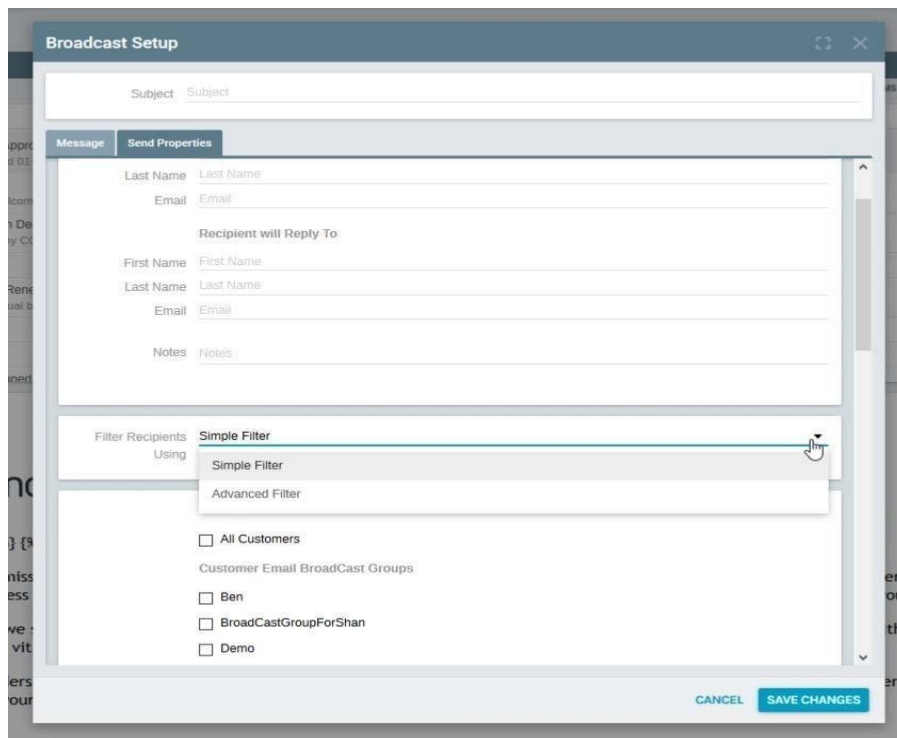
## Broadcast Messages

This feature sends a real time email blast to a list of existing customers based on designated filter criteria.

To set up a new Broadcast Message, select Add Broadcast.



Broadcasts are set up in the same manner as Auto Responders, except for Triggers. As shown on the screen shot below, you must choose to whom you wish to send the message. Multiple selections may be made.



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## Map of Event Triggers

(Note – any trigger marked with an \* indicates the sub-triggers are based on client specific settings)

**NEW ORDER** – Every time a **NEW** order is placed by a customer

**Country Equals\***

**State Equals\***

**Customer Type Equals\***

**Warehouse Equals\***

**Ship Method Equals\***

**Currency Equals\***

**Item Equals\***

**Order Status Equals**

- *Incomplete*
- *Pending*
- *CC Declined*
- *ACH Declined*
- *Cancelled*
- *CC Pending*
- *ACH Pending*
- *Accepted*
- *Printed*
- *Shipped*
- *Pending Inventory*

**Order Source Equals**

- *Customer Service*
- *Shopping Cart*
- *Web Wizard*
- *Recurring Order*
- *Import*
- *Back Order*
- *Replacement Order*
- *Return Order*
- *Web Recurring Order*
- *Ticket System*
- *API Order*
- *Back Order Parent*
- *NoShip*
- *Child Order*

**Language Equals\*****Email Subscribe Type Equals**

- *Opted In*
- *Not Opted In*

**ORDER STATUS CHANGE** – *can be used to address a new order that is not a first order or when an order has been shipped, etc*

**Order Status Equals**

- *Incomplete*
- *Pending*
- *CC Declined*
- *ACH Declined*
- *Cancelled*
- *CC Pending*
- *ACH Pending*
- *Accepted*
- *Printed*
- *Shipped*
- *Pending Inventory*

**Country Equals\*****State Equals\*****Warehouse Equals\*****Ship Method Equals\*****Item Equals\*****Language Equals\*****Order Source Equals**

- *Customer Service*
- *Shopping Cart*
- *Web Wizard*
- *Recurring Order*
- *Import*
- *Back Order*
- *Replacement Order*
- *Return Order*
- *Web Recurring Order*
- *Ticket System*

- *API Order*
- *Back Order Parent*
- *NoShip*
- *Child Order*

**Customer Type Equals\*****Order Count Equals\*****Currency Equals\*****Payment type Equals**

- *Cash*
- *Credit Card*
- *Check*
- *Credit Voucher*
- *Net 30*
- *Net 60*
- *Use Credit*
- *ACH Debit*
- *Bank Draft*
- *Wire Transfer*
- *Point Redemption*
- *COD*
- *Money Order*
- *Bank Deposit*
- *Other 1*
- *Other 2*
- *Other 3*
- *Wallet*

**Email Subscribe Type Equals**

- *Opted In*
- *Not Opted In*

**NEW CUSTOMER** – *1st time a customer record is created***Customer Type Equals\*****Language Equals\*****Email Subscribe Type Equals**

- *Opted In*
- *Not Opted In*
- 

**Default Warehouse Equals\***

**Customer Status Equals\*****Currency Equals\*****Country Equals\***

**CUSTOMER TYPE CHANGE** – *used when Customer Type changes. Can be used when going from retail to distributor, etc.*

**Customer Type Equals\*****Language Equals\*****Email Subscribe Type Equals**

- *Opted In*
- *Not Opted In*

**Currency Equals\*****Country Equals\***

**NEW VENDOR PAYMENT** (Commission Payout) – *can be used to address a Commission Payment made*

**Payment Type Equals**

- *Check*
- *Wire Transfer*
- *Credit Card*
- *Cash*
- *Payment Card*
- *Deduction*
- *Direct Deposit*
- *On Hold*
- *Point Account*

**Payee Country Equals\*****Default Warehouse Equals\*****Language Equals\***

**CUSTOMER STATUS CHANGE** – *used when a customer status changes.*

**Customer Status Equals\*****Default Warehouse Equals\*****Language Equals\***

**Country Equals\*****Email Subscribe Type Equals**

- *Opted In*
- *Not Opted In*

**Currency Equals\*****Customer Type Equals\*****NEW RECURRING ORDER (Autoship) – to address the setup of a new autoship****Payment Type Equals**

- *Primary Credit Card on File*
- *Secondary Credit Card on File*
- *Debit Checking Account*
- *Customer will send Payment*
- *Primary Wallet Account*
- *Secondary Wallet Account*

**Country Equals\*****Language Equals\*****Customer Type Equals\*****Email Subscribe Type Equals**

- *Opted In*
- *Not Opted In*

**Warehouse Equals\*****Currency Equals\*****RECURRING ORDER STATUS CHANGE (Autoship) – can be used to address an autoship that has gone from active to deleted and vice versa****Recurring Order Status Equals**

- *Active*
- *Inactive - (DO NOT USE THIS STATUS)*
- *Deleted*

**Language Equals\***

**Country Equals\***

**Warehouse Equals\***

**Customer Type Equals\***

**Item Code Equals\***

**Currency Equals\***

**CREDIT CARD EXPIRE** – *can be used to address when the Primary or Secondary credit card on file (usually for Autoships) is going to or has expired.*

**Language Equals\***

**Payment Type Equals**

- *Primary Credit Card on File*
- *Secondary Credit Card on File*
- *Debit Checking Account*
- *Customer will send Payment*
- *Primary Wallet Account*
- *Secondary Wallet Account*

**Customer Type Equals\***

**Country Equals\***

**Default Warehouse Equals\***

**Language Equals\***

**Recurring Order Status Equals**

- *Active*
- *Inactive - (DO NOT USE THIS STATUS)*
- *Deleted*

**Will Expire Equals** – This is a range from 90 days before, through 90 days after

**Currency Equals\***

**NEXT RECURRING ORDER** (*Autoship*) – *advises on upcoming autoship*

**Warehouse Equals\***

**Language Equals\***

**Will Create Equals** - This is a range from 90 days to 1 day before

**Frequency Equals**

- *Weekly*
- *Every Two Weeks*
- *Monthly*
- *Quarterly*
- *Twice a Year*
- *Yearly*
- *Bi-Monthly*
- *Every 4 Weeks*
- *Every 6 Weeks*
- *Every 8 Weeks*
- *Every 12 Weeks*

**Process type Equals**

- *Always Ship*
- *Back Order*

**Customer Type Equals\*****Item Code Equals\*****Country Equals\*****Currency Equals\*****SUBSCRIPTION EXPIRATION** – *to address subscription expiration.***Country Equals\*****Language Equals\*****Default Warehouse Equals\*****Subscription Equals\*****Will Expire Equals** - This is a range from 90 days before to 90 days ago**SMS Subscribe Type Equals**

- *Opted Out*
- *Opted In*
- *Not Opted*



**RANK CHANGE** –used to address when Recognition rank value increases. Only addresses the new rank value.

**Rank Equals\***

**Default Warehouse Equals\***

**Language Equals\***

**Country Equals\***

**State Equals\***

**CREDIT CARD BATCH CHARGE DECLINE (Autoship)** –used to address an autoship payment method that has been declined

**Decline Count Equals**

- *Has Declined Once*
- *Has Declined Twice*
- *Has Declined Three Times*
- *Has Declined Four Times*
- *Has Declined Five Times*
- *Has Declined Six Times*
- *Has Declined Seven Times*
- *Has Declined Eight Times*
- *Has Declined Nine Times*
- *Has Declined Ten Times*

**Warehouse Equals\***

**Language Equals\***

**Country Equals\***

**Customer Type Equals\***

**Item Code Equals\***

**Currency Equals**

**Order RMA** – used to address an order that contains an RMA number

**Country Equals\***

**State Equals\***

**Customer Type Equals\***

**Warehouse Equals\*****Ship Method Equals\*****Currency Equals\*****Item Equals\*****Order Status Equals\***

- *Incomplete*
- *Pending*
- *CC Declined*
- *ACH Declined*
- *Cancelled*
- *CC Pending*
- *ACH Pending*
- *Accepted*
- *Printed*
- *Shipped*
- *Pending Inventory*

**Order Source Equals\***

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- *Return Order*
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- *API Order*
- *Back Order Parent*
- *NoShip*
- *Child Order*

**Language Equals\*****Email Subscribe Type Equals**

- *Opted In*
- *Not Opted In*