



SMS Automated Conversations

Add New or Modify Existing Template:

+ Seller Lead Capture

Each conversation is forwarded at completion.

Also forward each response: ☐

Choose a Step to Configure:

- New Contact -

Message Received is a Contact Field

Field Type: First & Last Name

Fill Options Below

SMS reply:

Thanks <first>!
Glad to meet you!
Are you currently working with a
realtor - yes/no?

API Goal CallName:

Next Step: + Current Realtor Status

Update

Close

How To: Create & Use SMS Automated Conversations

SMS Automated Conversations

Benefits

- Improve lead capture from your outdoor and display ads
- Focus your effort with automated lead qualification
- Achieve fast follow up for the best leads
- Track and oversee your lead capture system right on your Infusionsoft dashboard

Upgrade Here:

<https://sd123.customerhub.net/sms-automated-conversations>

SMS Automated Conversations

Features

- Recognize new vs existing contacts
- Recognize keywords & reply based on match
- Capture contact information
- Personalize replies using merge fields
- Trigger automation in Infusionsoft
- Receive email notification for completed conversations
- Every conversation is saved with a Note Record, for simple tracking and reporting

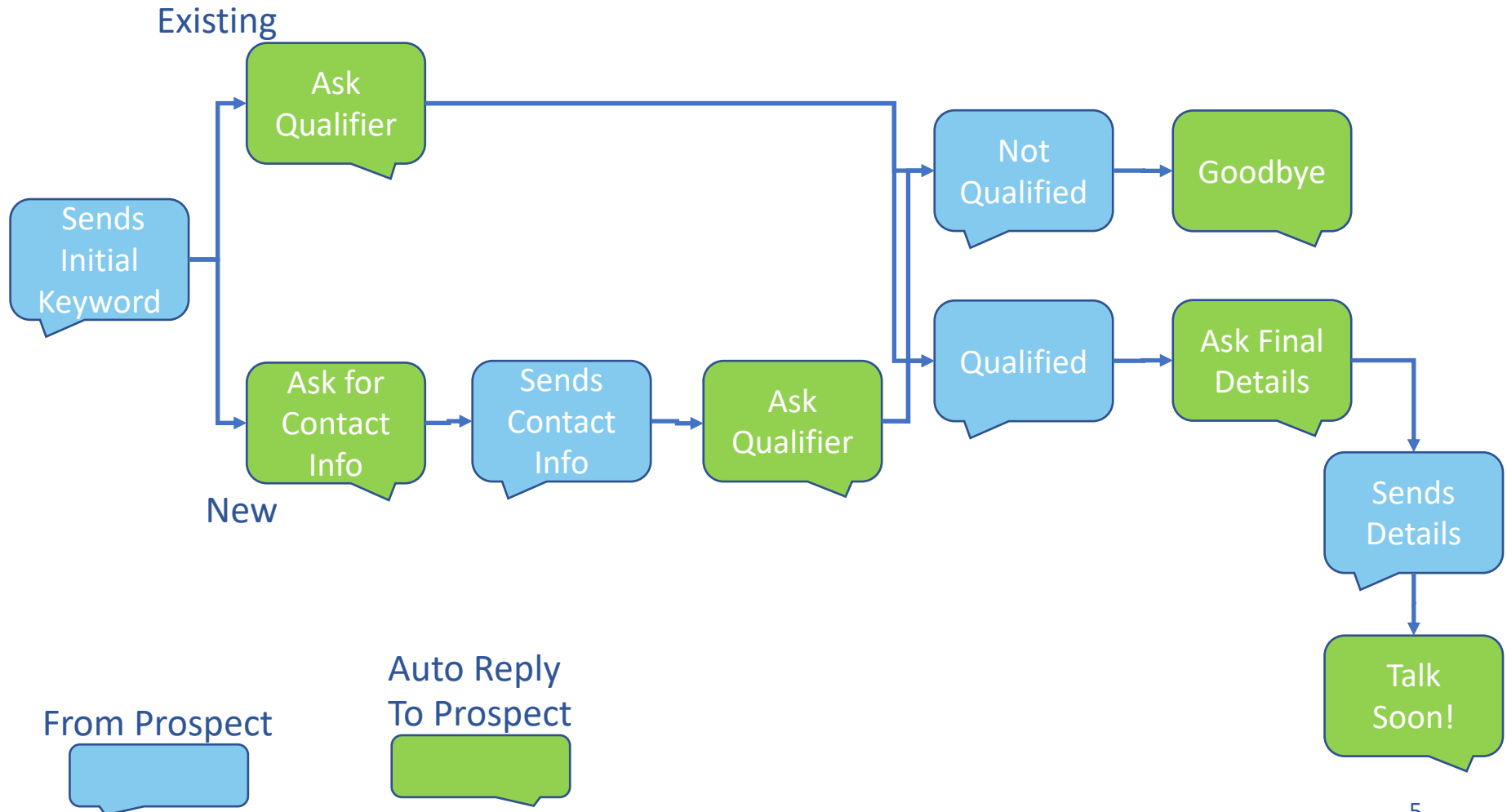
SMS Automated Conversations

Steps to Deploy an Automated Conversation:

1. Design the Ad & Conversation on paper
2. Build a Template for the Conversation in turboDial
3. Associate the Template to an Inbound Number

1: Design the Ad & Conversation on paper

Typical Conversation Flow

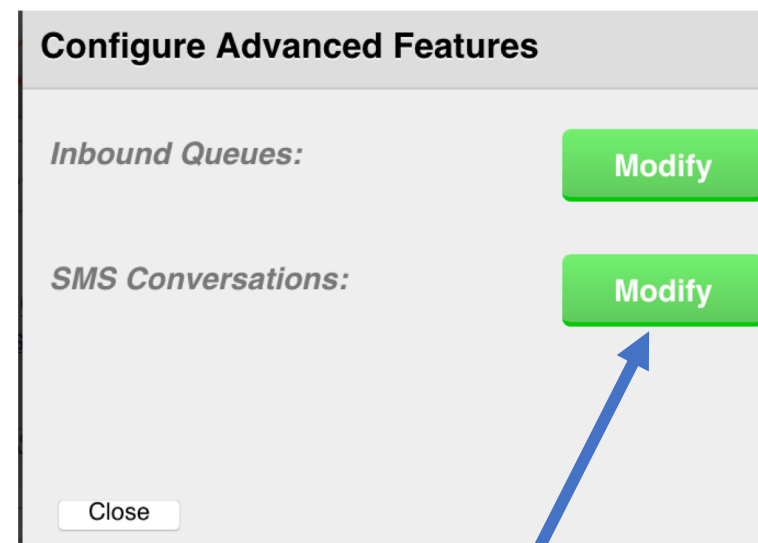
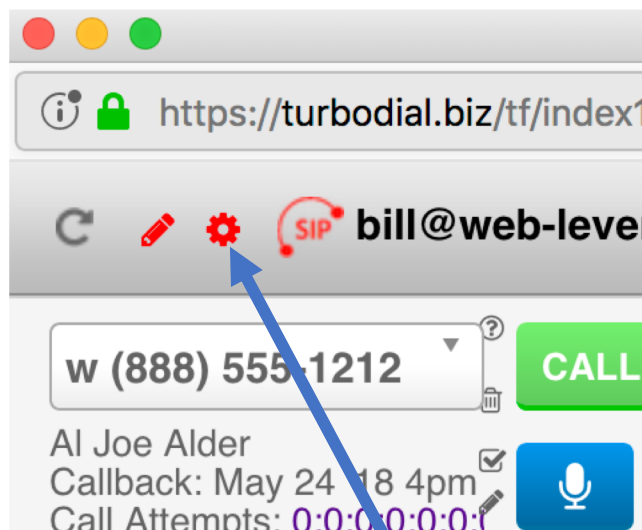


1: Design the Ad & Conversation on paper

Example: Advertise that home sellers can text to a number to get an appointment with a realtor

- Using an inbound number that also receives SMS messages for other purposes?
 - If yes – must tell the prospect to send a unique keyword for example: “Text SELLMYHOME to (123) 456-7890”
 - Otherwise – “Send me a text at (123) 456-7890”
- What questions will you ask to qualify the lead?
- What contact information do you need for follow up?

2: Build a Template for the Conversation in turboDial







Only Admin users in turboDial will see this button.

Create a Template

SMS Automated Conversations



Add New or Modify Existing Template:

Each conversation is forwarded at completion.

Also forward each response: ☐


Choose a Step to Configure:

Message Received is

SMS reply:

API Goal CallName:

Next Step: 

Enter a unique name for the SMS Template

Step Type:

Two Initial Steps in the Template

- When the first SMS arrives turboDial looks for the 'from' phone number in Infusionsoft and starts the Conversation at the corresponding Initial Step:
 - New Contact – number not found
 - Existing Contact – number was found
- You should build the template to handle both cases.

SMS Automated Conversations

Add New or Modify Existing Template:



Seller Lead Capture

Each conversation is forwarded at completion.

Also forward each response: ☐

Choose a Step to Configure:




- ✓ - New Contact -
- Existing Contact -

Message Received is Generic

Components of Each Step

SMS Automated Conversations



Add New or Modify Existing Template:

+   

Each conversation is forwarded at completion.

Also forward each response: ☐

Choose a Step to Configure:

  - New Contact -

Message Received is

SMS reply:

API Goal CallName:



Next Step: +

- Received Message Type:
Generic, Keyword, Contact Field
- Reply: the response to send back to the contact – this response will shape what happens in the next step.
- API Goal: the Call Name for an Infusionsoft API Goal when this step happens (can leave blank)
- Next Step: the next step in the multi-step Conversation

Received Message Types

SMS Automated Conversations

Add New or Modify Existing Template:

+   Seller Lead Capture

Each conversation is forwarded at completion.



Also forward each response: ☐

Choose a Step to Configure:

Message Received in

- New Contact -
 Generic
 ✓ a Keyword
 a Contact Field

Add New or Choose Existing Keyword:

+  

Options Below are Specific to this Keyword

SMS reply:

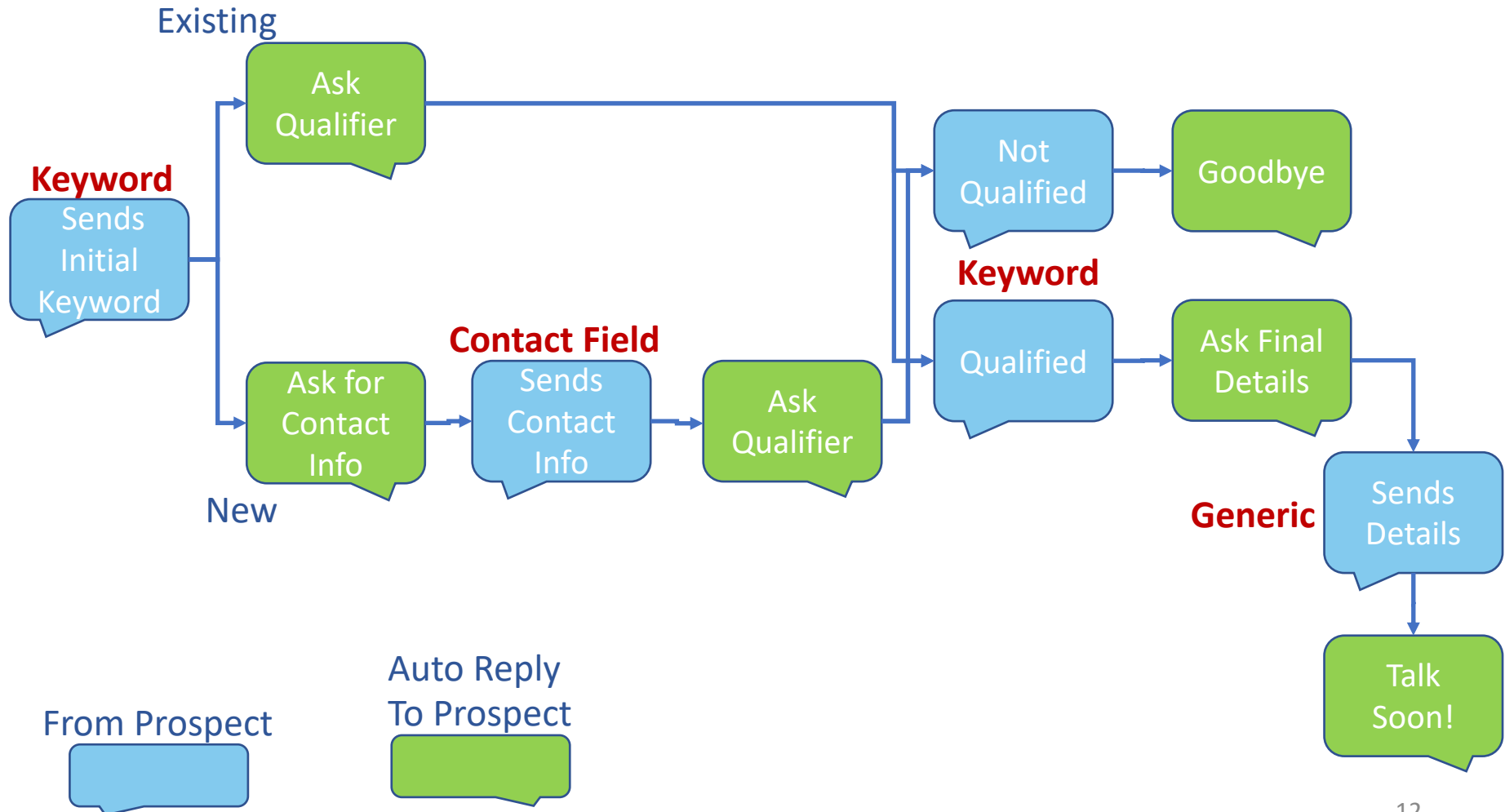
API Goal CallName:

Next Step: + None

Close Update

- Generic – the inbound SMS to this step can be of any format
- Keyword – the inbound SMS to this step is expected to contain a keyword, and the keyword found will determine the next step in the conversation
- Contact Field – the inbound SMS to this step is expected to be a field to be saved in the Contact Record: first name, last name, email

Received Message Types



Initial Step: New Contact

In our scenario, the first inbound SMS will contain a Keyword of “sell”

SMS Automated Conversations

Add New or Modify Existing Template:
+ [icon] [icon] [icon] Seller Lead Capture

Each conversation is forwarded at completion.
Also forward each response: ☐

Choose a Step to Configure:
- New Contact -
Generic
✓ a Keyword
a Contact Field

Message Received is

Add New or Choose Existing Keyword:
+ [icon] [icon] [icon]

Options Below are Specific to this Keyword

SMS reply:

API Goal CallName:

Next Step: + None

Close Update

Message
Received is a
Keyword

Add a
Keyword

SMS Automated Conversations

Add New or Modify Existing Template:
+ [icon] [icon] [icon] Seller Lead Capture

Each conversation is forwarded at completion.
Also forward each response: ☐

Choose a Step to Configure:
- New Contact -

Message Received is a Keyword

Add New or Choose Existing Keyword:
+ [icon] [icon] [icon]

Options Below are Specific to this Keyword

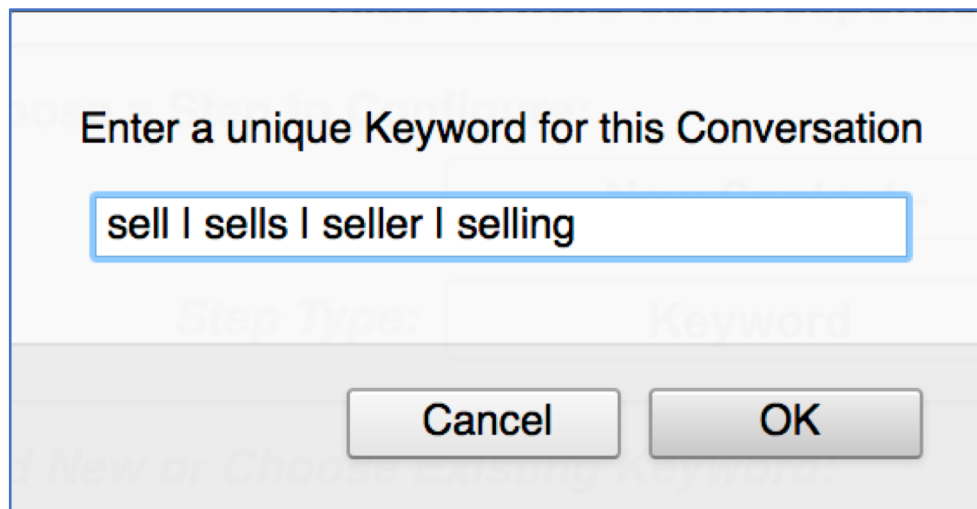
SMS reply:

API Goal CallName:

Next Step: + None

Close Update

Keywords



Enter a unique Keyword for this Conversation

sell | sells | seller | selling

Cancel OK

You can enter multiple variations that are equivalent to the Keyword and separate them by the vertical bar |. These are considered as one Keyword.




Keywords are not case sensitive. 'DEMO', 'Demo' and 'demo' are the same.

A single * can be used as a Keyword wildcard – it will match any contents if no other Keyword was matched. The wildcard Keyword can only be used when other Keywords are also defined.

New Contact – First reply

SMS Automated Conversations

Add New or Modify Existing Template:

+    Seller Lead Capture

Each conversation is forwarded at completion.




Also forward each response: ☐

Choose a Step to Configure:

- New Contact -

Message Received is a Keyword

Add New or Choose Existing Keyword:

+    sell|sells|seller|selling

Options Below are Specific to this Keyword

SMS reply:

Hi!
Thanks for getting in touch!
What is your first and last name?

API Goal CallName:

Next Step: + None

Close Update

This reply shapes what happens in the next step

Add Next Step

SMS Automated Conversations

Add New or Modify Existing Template:

+

Seller Lead Capture

Each conversation is forwarded at completion.

Also forward each response: ☐

Choose a Step to Configure:

- New Contact -

Message Received is a Keyword

Add New or Choose Existing Keyword:

+

sell|sells|seller|selling

Options Below are Specific to this Keyword

SMS reply:

Hi!

Thanks for getting in touch!

What is your first and last name?

API Goal CallName:

Next Step:

+

None

Close

Update

Enter a unique name for the new Step in this Template

Get First & Last Name

Step Type: Keyword




Cancel

OK

When a Next Step is added it becomes available to be configured

SMS Automated Conversations

Add New or Modify Existing Template:

+    Seller Lead Capture

Each conversation is forwarded at completion.




Also forward each response: ☐

Choose a Step to Configure:

Message Received

- ✓ - New Contact -
- Existing Contact -
- Get First & Last Name

Add New or Choose Existing Keyword:

+    sell|sells|seller|selling

Options Below are Specific to this Keyword

SMS reply:

Hi!
Thanks for getting in touch!
What is your first and last name?

API Goal CallName:

Next Step: + Get First & Last Name

Close Update




2. Then find it here

1. Add it here

Step: Get First & Last Name

Choose Step




SMS Automated Conversations

Add New or Modify Existing Template:
   Seller Lead Capture

Each conversation is forwarded at completion.
 Also forward each response: ☐

Choose a Step to Configure:
 Message Received i

- ✓ - New Contact -
- Existing Contact -
- Get First & Last Name

Add New or Choose Existing Keyword:
   sell|sells|seller|selling

Options Below are Specific to this Keyword




SMS reply:
 Hi!
 Thanks for getting in touch!
 What is your first and last name?

API Goal CallName:

Next Step: + Get First & Last Name

Choose type of Message Received

SMS Automated Conversations

Add New or Modify Existing Template:
   Seller Lead Capture

Each conversation is forwarded at completion.
 Also forward each response: ☐

Choose a Step to Configure:
 Message Received i

- Generic
- a Keyword
- ✓ a Contact Field

Field Type: First Name

Fill Options Below




SMS reply:

API Goal CallName:

Next Step: + None

Choose Field Type

SMS Automated Conversations

Add New or Modify Existing Template:
   Seller Lead Capture

Each conversation is forwarded at completion.
 Also forward each response: ☐

Choose a Step to Configure:
 - New Contact -

Message Received i

- First Name
- Last Name
- ✓ First & Last Name
- Email

Field Type:

Fill Options Below

SMS reply:




API Goal CallName:

Next Step: + None

Step: Get First & Last Name

SMS Automated Conversations

Add New or Modify Existing Template:

+    Seller Lead Capture

Each conversation is forwarded at completion.

Also forward each response: ☐

Choose a Step to Configure:

- New Contact -

Message Received is a Contact Field

Field Type: First & Last Name

Fill Options Below

SMS reply:

Thanks <first>!
Glad to meet you!
Are you currently working with a
realtor - yes/no?

API Goal CallName:

Next Step: + None

Update

Close

<first> and <last> are
merge fields

Create the reply to be sent
back

This reply shapes what
happens in the next step

Step: Get First & Last Name

SMS Automated Conversations

Add New or Modify Existing Template:

+ [icon] [icon] [icon] [icon] **Seller Lead Capture**

Each conversation is forwarded at completion.

Also forward each response: ☐

Choose a Step to Configure:

- New Contact -

Message Received is a Contact Field

Field Type: First & Last Name

Fill Options Below

SMS reply:

Thanks <first>!
Glad to meet you!
Are you currently working with a
realtor - yes/no?

API Goal Callname:

Next Step: + None

Update

Close

Add a new Step that will be the Next Step

Enter a unique name for the new Step in this Template

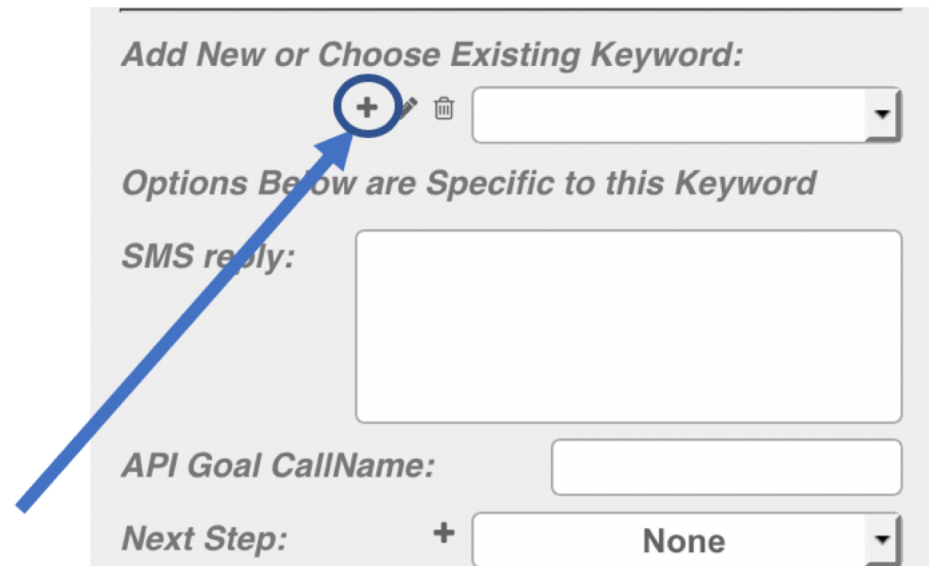
Current Realtor Status

Cancel OK

This reply is our Qualifying Question.
The next step will use the answer.

Step: Current Realtor Status - 2 Keywords

- The previous step asked: Are you currently working with a realtor – yes/no?
- Specify both 'yes' and 'no' as separate Keywords in this step
- Each of those Keywords will have different actions



The screenshot shows a configuration panel for a keyword. At the top, it says "Add New or Choose Existing Keyword:". Below this is a row containing a blue circle with a white "+" icon, a small trash icon, and a text input field. A blue arrow points from the bottom left towards the "+" icon. Below this row, it says "Options Below are Specific to this Keyword". Underneath, there are three fields: "SMS reply:" followed by a large text area, "API Goal CallName:" followed by a text input field, and "Next Step:" followed by a dropdown menu currently showing "None".

Step: Current Realtor Status - 2 Keywords

We're expecting them to reply with either 'yes' or 'no'

SMS Automated Conversations

Add New or Modify Existing Template:
 + [icon] [icon] [icon] [icon] **Seller Lead Capture** ▾

Each conversation is forwarded at completion.
 Also forward each response: ☐

Choose a Step to Configure:
 [icon] [icon] **Current Realtor Status** ▾

Message Received is **a Keyword** ▾

Add New or Choose Existing Keyword:
 + [icon] [icon] [icon] **yes|y|yup|yeah** ▾

Options Below are Specific to this Keyword

SMS reply:

OK. We hope you have quick success! Let us know if we can be of service sometime in the future.

API Goal CallName:

Next Step: + **None** ▾

Keyword

Reply

No further steps

SMS Automated Conversations

Add New or Modify Existing Template:
 + [icon] [icon] [icon] [icon] **Seller Lead Capture** ▾

Each conversation is forwarded at completion.
 Also forward each response: ☐

Choose a Step to Configure:
 [icon] [icon] **Current Realtor Status** ▾

Message Received is **a Keyword** ▾

Add New or Choose Existing Keyword:
 + [icon] [icon] [icon] **no|n|nope|nah** ▾

Options Below are Specific to this Keyword

SMS reply:

OK. When would be a good time for us to meet - best day and time for you?

API Goal CallName:

Next Step: + **Get Appointment** ▾

Keyword

Reply

Another step

Step: Current Realtor Status - Wildcard

We want them to answer our question with either 'yes' or 'no'.

But they may say something else, such as 'ok'.

Use the Wildcard keyword to catch that and ask your question again.

Add a *
as the Wildcard
Keyword

Ask the
question
again

Continue in
this current
Step

SMS Automated Conversations

Add New or Modify Existing Template:

+

Seller Lead Capture

Each conversation is forwarded at completion.

Also forward each response: ☐

Choose a Step to Configure:

Current Realtor Status

Message Received is

a Keyword

Add New or

+

yes|y|yup|yeah
no|n|nope|nah

✓ *

Options Below are Specific to this Keyword

SMS reply:

Sorry, I didn't get that.
Are you currently working with a
realtor? Please reply YES or NO.

API Goal CallName:

Next Step:

+

Current Realtor Status




Update

Close

Step: Get Appointment

SMS Automated Conversations



Add New or Modify Existing Template:

+    Seller Lead Capture

Each conversation is forwarded at completion.

Also forward each response: ☐

Choose a Step to Configure:

  Get Appointment

Message Received is Generic

Fill Options Below

SMS reply:

OK, thanks.
We will be in touch

API Goal CallName: NewLead

Next Step: + None

Update

Close

Use a “Generic” step because the SMS will come into this step in an undetermined format, such as “Tuesday 1 pm”




Since we’re done, use a final reply that does not expect a response.

Trigger an API Goal and use Campaign Builder automation to make sure follow up happens. For example – assign a Task.

Initial Step: Existing Contact

SMS Automated Conversations

Add New or Modify Existing Template:

+    Seller Lead Capture

Each conversation is forwarded at completion.



Also forward each response: ☐

Choose a Step to Configure:

- Existing Contact -

Message Received is a Keyword

Add New or Choose Existing Keyword:

+   sell|sells|seller|selling

Options Below are Specific to this Keyword

SMS reply:

Hi <first>!
We're glad you got in touch with us!
Are you currently working with a realtor - yes/no?

API Goal CallName:

Next Step: + Current Realtor Status

Close Update

We've completed the steps for the "New Contact" part of the conversation.

Now complete the "Existing Contact" part – it will be simpler.

In our scenario, the first inbound SMS should contain a Keyword

Enter the same keyword used for the New Contact part.




Note: we don't need to ask for their name - since they are "existing" we should know it.

The "Current Realtor Status" step was previously created, so we just need to choose it.

Save your new Template

SMS Automated Conversations



Add New or Modify Existing Template:

+    Seller Lead Capture

Each conversation is forwarded at completion.

Also forward each response: ☐

Choose a Step to Configure:

  Get Appointment

Message Received is Generic

Fill Options Below

SMS reply:

OK, thanks.
We will be in touch

API Goal CallName: NewLead

Next Step: + None

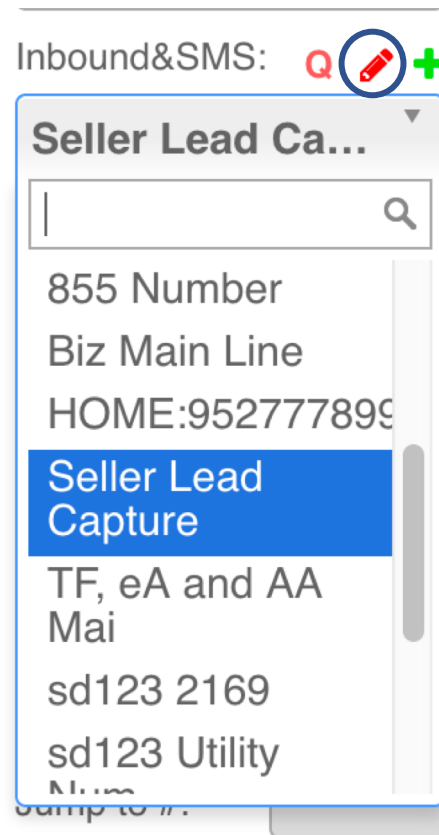
Update

Close

Click Update to save your changes

Then close the config screen

3: Associate the Template to an Inbound Number



Choose an Inbound Number and click the Red pencil button to configure it.

Associate the template to an Inbound Number

Configure Inbound Number

Current Settings for +19526495442

Capabilities: Voice and SMS

Use as an SMS From ID? ON

Assigned User's Infusionsoft Email ID:
Will also be the backup email for forwarding SMSs

bill@web-lever.com

Optional label in selector:
Example:
Dana's Office

Seller Lead Capture

Inbound Call Screen Pops

Send to These Users: Send to All? ☒

bill@web-lever.com,

Record inbound calls to this number? ☐

Enable Time of Day Routing? ☐

Delete this number from my account? ☐

SMS Conversation

- none -
✓ DEMO Lead Capture
Seller Lead Capture

Close
Update & Next

Choose the Template in the SMS Conversation selector, the click the Update button.

Completed Conversations

The conversation is forwarded as an email to the email address configured into the Inbound Number.

noreply@turbodial.biz

SMS Conversation (Seller Lead Capture) from: Al Joe Alder +16302538502

To: Bill Jenkins,

Reply-To: noreply@turbodial.biz

SMS Conversation (Seller Lead Capture) from Al Joe Alder +16302538502, to +19526495442
Forwarding to address associated with the inbound number: bill@web-lever.com

Step: Existing Contact - Wed, 10 Oct 2018 12:59:52 -0500

Received: Sell

Autoreply: Hi Al Joe!

We're glad you got in touch with us.

Are you currently working with a realtor - yes/no?

--

Step: Current Realtor Status - Wed, 10 Oct 2018 13:00:00 -0500

Received: No

Autoreply: OK, when would be a good time for us to meet - best day and time for you?

--

Step: Get Appointment - Wed, 10 Oct 2018 13:00:25 -0500

Received: Tuesday at noon

Autoreply: OK thanks.

We will be in touch.

API Goal: turboDialSMS NewLead

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[Click Here to Reply](#)

Contact: [1656](tel:1656) Email: Aaa@timefusion.biz

A Contact Record was created:



- Phone Number
- First Name
- Last Name
- Email address

An API Goal was Triggered

- Your automation can begin additional follow up

A Note Record was created

Dashboard Reports

- Use the Admin->Task Note report tool in Infusionsoft to create Saved Reports
- Two primary “Main Search” fields to use:
 - turboDial: SMS Auto Conversation Completed  Note – ends with a ‘d’
 - turboDial: SMS Auto Conversation Incomplete  Note – no ‘d’
- Can also search for a specific Template type:
 - turboDial: SMS Auto Conversation (Seller Lead Capture) Completed

Notes

- You can specify the “Call Name” for an API Goal to trigger when any step is reached.

The API Goal “Integration” is always: turboDialSMS

- A Message Received type of “Generic” can accept an SMS that contains a ‘?’ or any of the words who, what, when, where, why, how.

Message Received types “Keyword” and “Field” cannot accept an SMS that contains a question and will forward it for normal SMS message processing outside of the Automated Conversation.

- A Conversation is considered complete when it arrives at a step with no next step.

- Additional text messages from the contact within several minutes of completion will be added to the Conversation

- An incomplete Conversation will timeout after several hours. Any subsequent text message from the contact will be considered for a new Conversation.



SMS Automated Conversations

Received Message Type: Keyword

Use the 'Keyword' type when you want to choose the Next Step in the Conversation based on the answer the contact sent in reply to your question.

- A Keyword step can define multiple keywords and each keyword can have an associated group of
 - Reply
 - API Goal
 - Next Step
- So, a Keyword step can branch to different Next Steps depending on the Keyword that is matched.
For example, Keywords 'Yes' and 'No' can cause different Next Steps in the conversation.
- If the conversation is waiting for a Keyword and an SMS arrives that does not contain any of the Keywords, that SMS will be processed as a normal SMS outside of the conversation
 - Or, you can handle it within the conversation by including the wildcard Keyword: *
The wildcard will match any contents if no other Keyword match was found

Received Message Type: Contact Field

Use the 'Contact Field' type when you have asked for personal information.

The fields that turboDial can process are:

- First – the contents of the inbound SMS will be stored in the First Name field of the Contact Record
- Last – the contents of the inbound SMS will be stored in the Last Name field of the Contact Record
- First & Last – the contents of the inbound SMS will be parsed and separated, and the first portion stored in the First Name field and the second portion stored in the Last Name field of the Contact Record
- Email - the contents of the inbound SMS will be stored in the Email address field of the Contact Record

Received Message Type: Generic

Use the 'Generic' type when you are expecting information that is of an unknown format.

For example:

- Street address
- Date and time
- A description of the solution they're seeking