EONS 3

User Training Guide

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GETTING STARTED

Learn how the EONS Platform as a Service (PaaS) supports the curation, deployment, and monitoring of email, voice, text, and TTY communications.

ABOUT THE ENTERPRISE OMNICHANNEL NOTIFICATION SYSTEM (EONS)

EONS is a robust Platform as a Service (PaaS) that supports the curation, deployment, and monitoring of email, voice, text, and TTY communications. The EONS Knowledge Base is a user training guide designed to assist staff in navigating the new Enterprise Omnichannel Notification System (EONS) portal and deploying common user scenarios. EONS platform capabilities covered in this guide include:

CAMPAIGN CONTROL CENTER

Command and control campaign parameters in real-time from a single, centralized location.

SITUATIONAL INTELLIGENCE AND VISUAL MAPPING

Segment data based on mapping tools so that you can send mission critical communications to customers based on their location.

AUTOMATED RESPONSIVENESS

Build your own digital workflows. Send SMS messages based on preset triggers, rules, and conditions. Availability depends on your configuration.

TEMPLATED CUSTOMER COMMUNICATIONS

Deploy communications quickly and efficiently using message and campaign templates that are aligned to your playbook.

AD HOC COMMUNICATIONS

Filter through an unlimited number of data segments to load and send messages over your customers' preferred channels.

DASHBOARDS AND REPORTS

Gauge campaign effectiveness with real-time reporting to identify customer patterns and trends at both a group and individual level.

CUSTOMER CONTACT DATA ENRICHMENT

Update and verify customer data in real time by automating capture and verification directly with your customers.

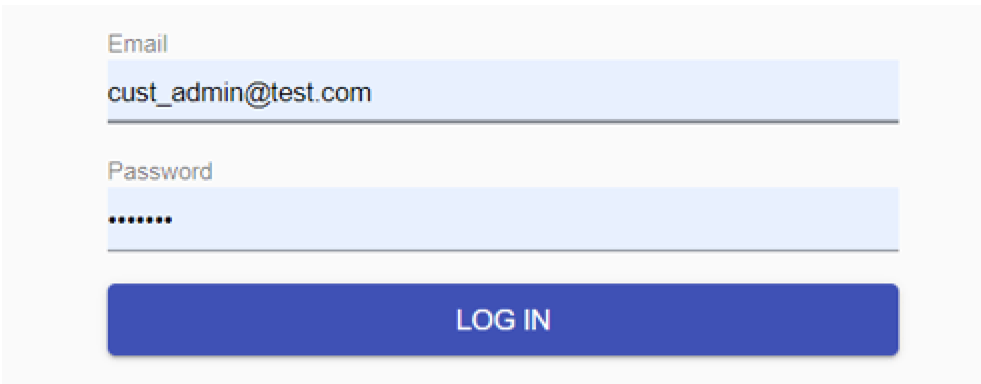
SECURITY AND COMPLIANCE

Ensure compliance with relevant appropriate government and industry regulations using secure communication channels.

USER LOGIN

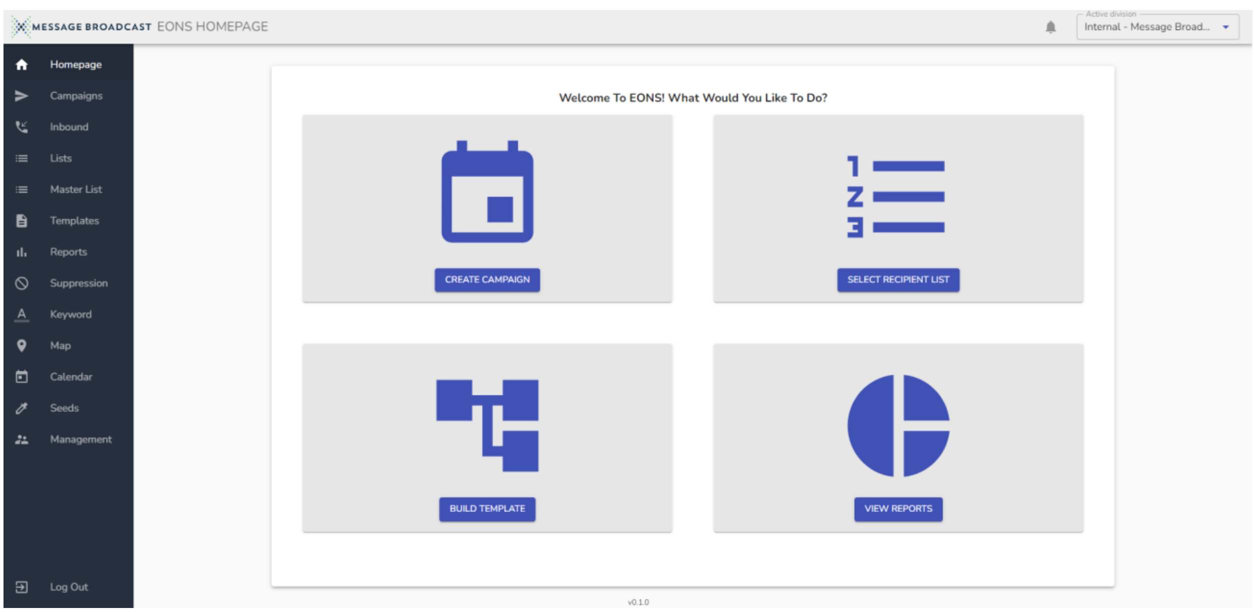
GETTING STARTED WITH EONS

The EONS portal uses a login requiring an Email address and Password to enter the site. *



* Suggested browser for EONS: Google Chrome

Once logged in, users will see the EONS Homepage.



HOMEPAGE NAVIGATION

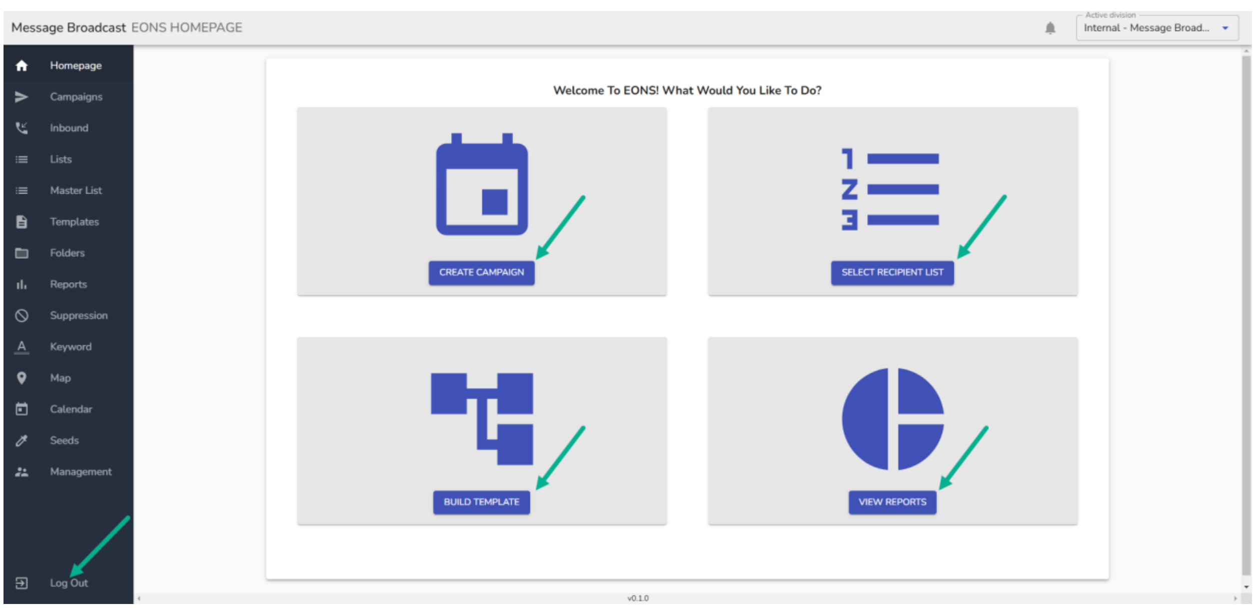
After logging in to the EONS portal, click on the left side bar icons and navigate to the respective pages.

Based on the organization's configuration and the user's permissions, these pages may include:

- Campaigns
- Inbound
- Lists
- Master List
- Templates
- Folders
- Reports
- Suppression
- Keyword
- Map
- Calendar
- Approvers
- Seeds
- Management

Users can also click on each of the four shortcut options on the main page:

- Create Campaign
- Select Recipient List
- Build Template
- Analyze Reports



Users may log out of the EONS portal from the homepage.

CAMPAIGNS

Create and launch campaigns with the EONS centralized hub, anywhere you are, and at any time.

CAMPAIGN DASHBOARD

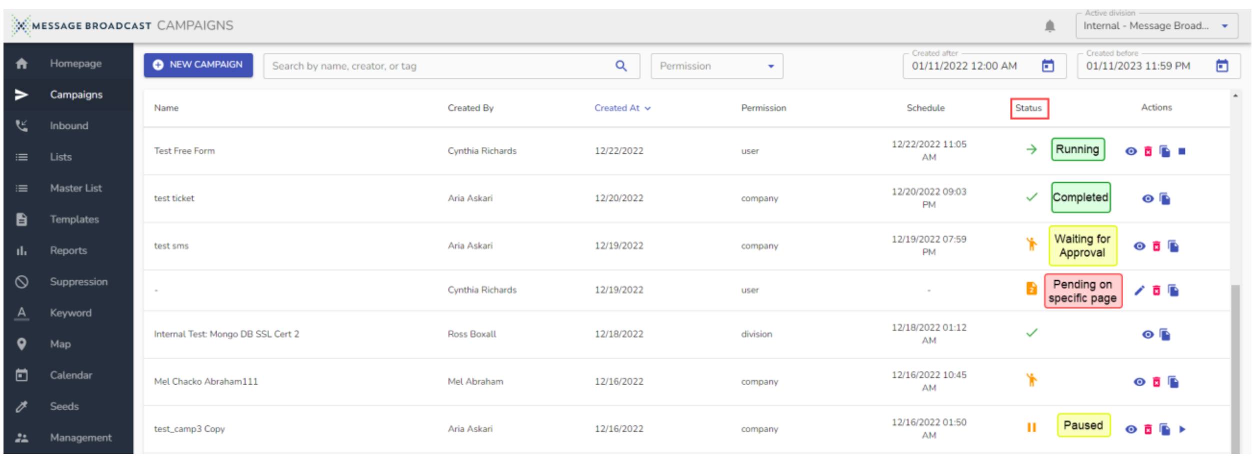
The campaign dashboard enables users to track and manage campaigns as they are created, edited, and launched.

Campaigns trigger the actual voice, text, and email messages that are sent directly to customers. There are two ways to create and launch campaigns: Create Campaign and Create Ad Hoc Campaign.

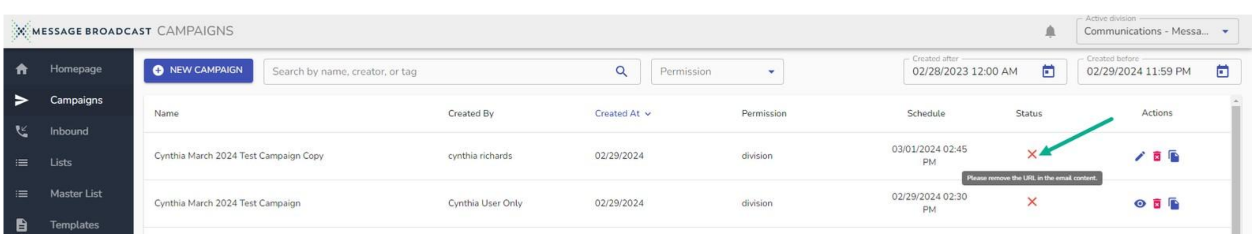
The standard Create Campaign function provides a selection of pre-approved and pre-created message templates. The Create Ad Hoc Campaign function allows for "on-the-fly" creation of messages with any type of content.

VIEW CAMPAIGNS

Users can view and track campaigns as they are created, edited, and launched via the Status column that displays the various campaign stages.

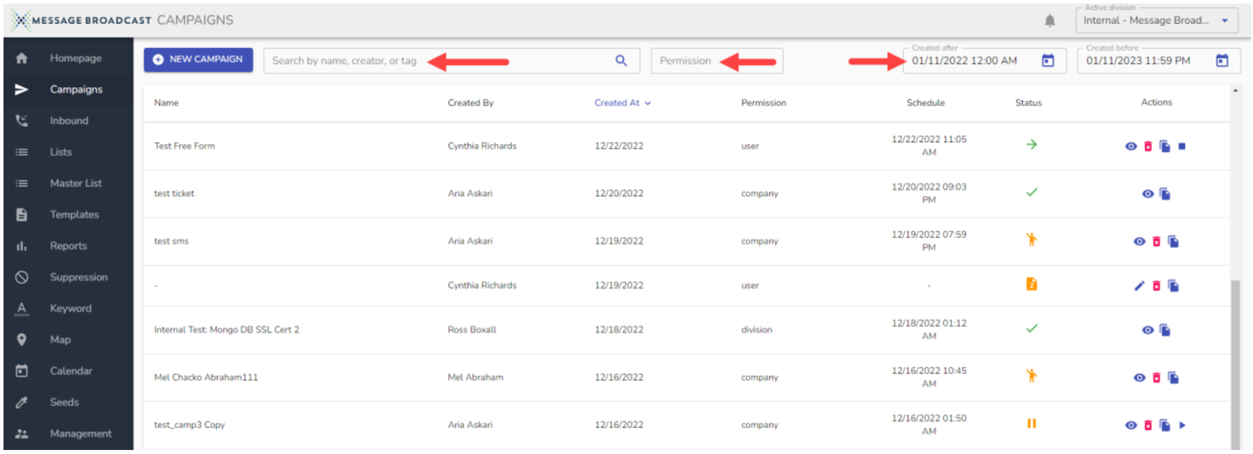


If a campaign is rejected by an approver, the approver's notes as to why the campaign was rejected are visible by hovering over the rejected icon.



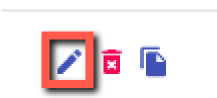
SEARCH CAMPAIGNS

Users can search for campaigns by campaign name, creator, tag, and/or campaign creation time as they are created, edited, and launched.



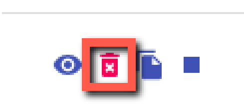
EDIT CAMPAIGNS

Users can edit a Pending campaign once it has been created, if it has not been submitted for approval or previously approved for launch, by using the blue “Edit” (pencil) icon under “Actions.”



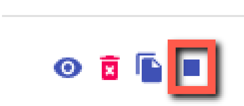
DELETE CAMPAIGNS

Users can delete campaigns that are not in Completed status or launched by clicking on the “Delete” (trash can) icon under “Actions.” Once launched, campaigns cannot be deleted from the dashboard.



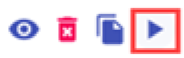
STOP CAMPAIGNS

Users can stop a running campaign at any time before the scheduled launch time by clicking on the “Stop” icon under “Actions.” Any messages which are scheduled in the future will be stopped. If messages have already begun sending, this action may not prevent messages which have already reached a certain step in the process.



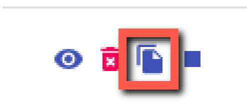
RESUME CAMPAIGNS

Once a campaign has been stopped, it can be resumed by clicking on the "Resume" (play) icon under "Actions."



CLONE CAMPAIGNS

Users can reuse or clone a Completed campaign by clicking on the "Copy" icon. The new campaign will be identical to the one it originated from, but the word Copy will be appended to its name. The cloned campaign will use the same template as the original campaign but can be used with a new recipient list.



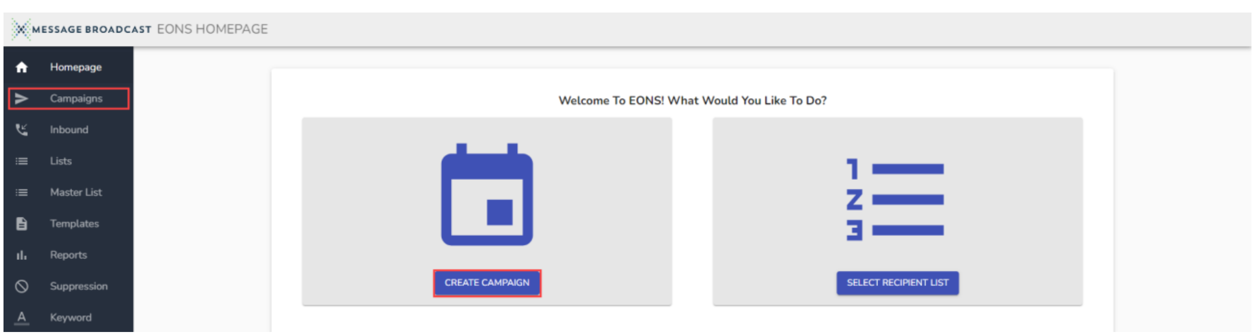
Note: If changes are needed to the text copy, voice copy, etc., then the template used for the original campaign should be cloned and edited for use in a new campaign.

NEW CAMPAIGN

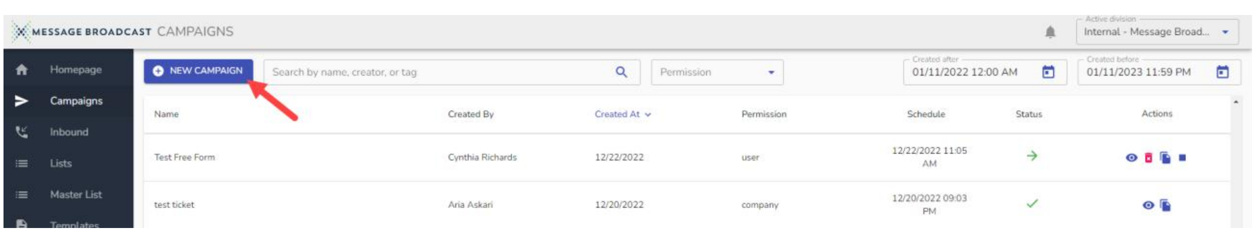
CREATING A CAMPAIGN

HOW TO LAUNCH AN EONS CAMPAIGN

Launch a new messaging campaign to a targeted set of customers by clicking on "Create Campaign" on the portal home page.



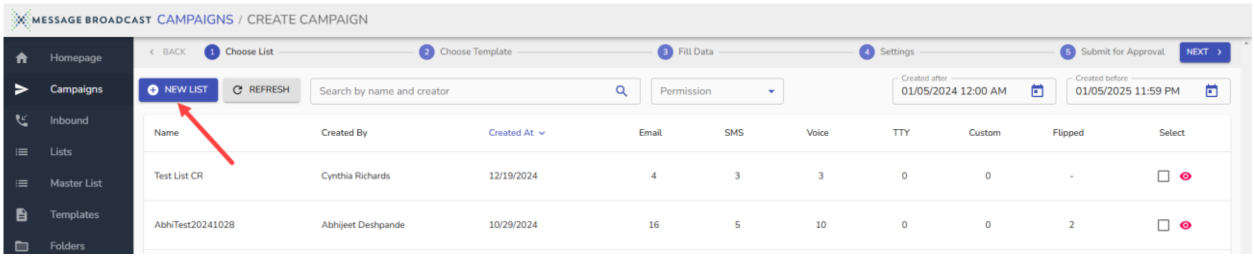
Alternatively, users can create a Campaign by clicking on the blue "New Campaign" button on the top left of the portal.



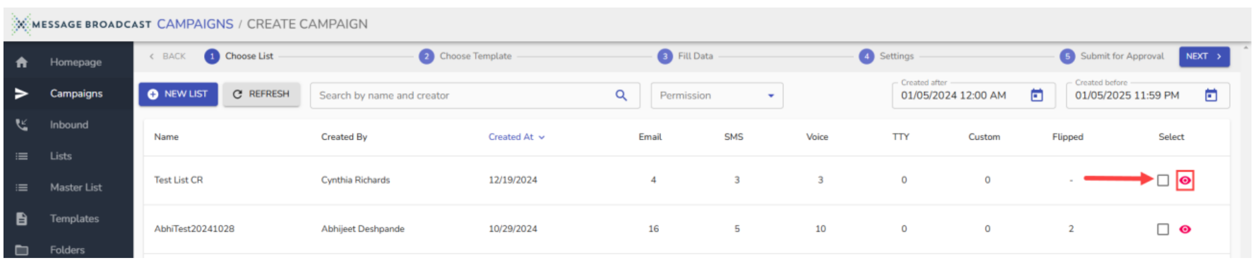
THERE ARE 5 STEPS INVOLVED IN THE CAMPAIGN LAUNCH PROCESS

CHOOSE LIST

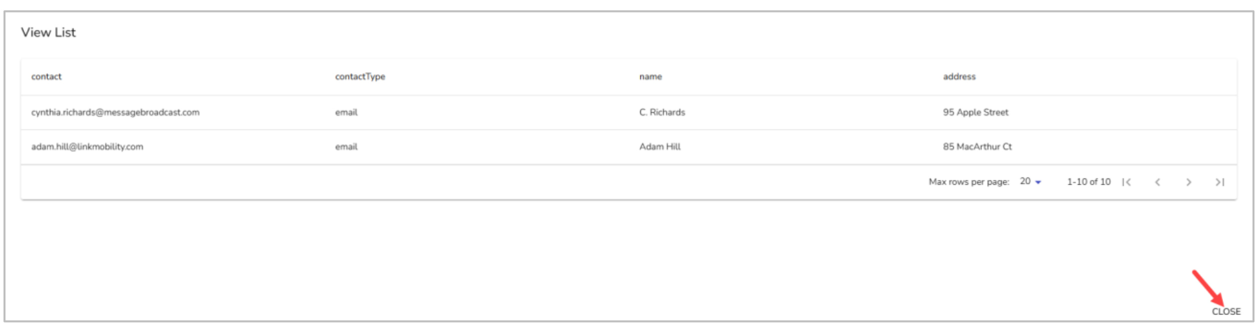
If a new or custom target list has not been created, users must create a List by clicking on the blue “New List” button. For detailed steps on creating a new List, please go to Create, View, Edit, and Clone Lists.



When using existing Lists, select the appropriate List by checking the Select box on the far right of the portal and then click “Next” on the top right corner. Users may view the contents of the list prior to selecting by clicking on the view icon.

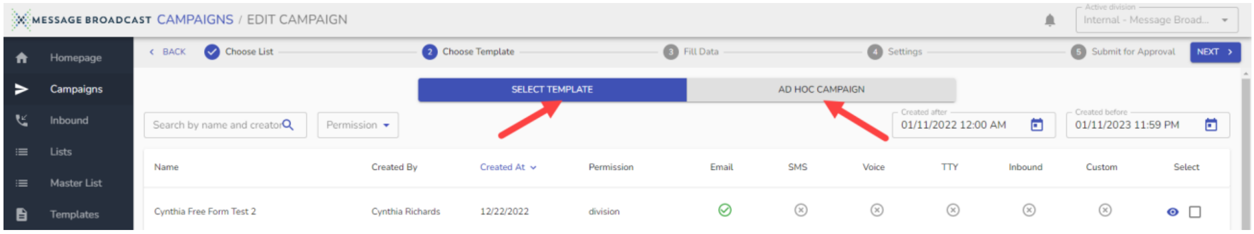


To close the “View List” screen, and navigate back to the Create Campaign screen, click on “CLOSE.”



SELECT TEMPLATE

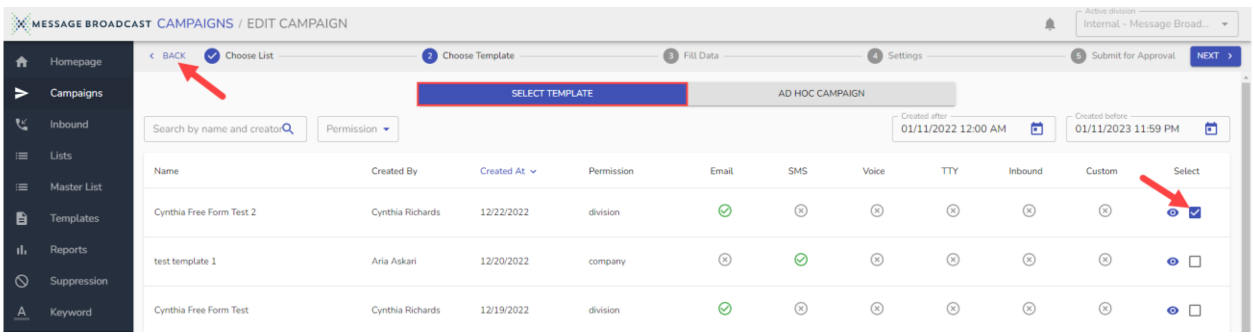
After clicking “Next” on the previous screen, users will be taken to the Template selection screen where they can select an existing Template or create an Ad Hoc Campaign.



Note: For detailed steps on creating templates, go to Templates.

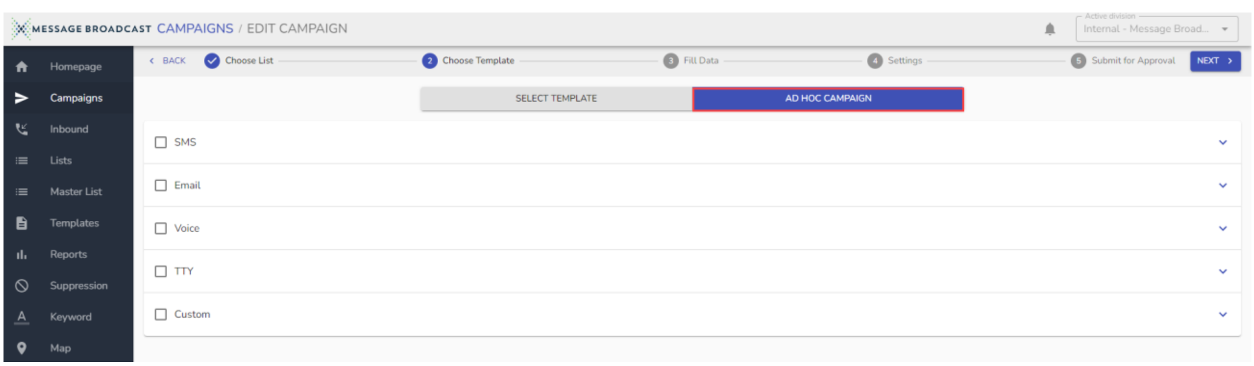
TEMPLATED CAMPAIGNS

For creating a campaign using existing Templates, check the box under “Select” to pick the appropriate template, then click “Next” on the top right portal corner. Users may view the contents of the template prior to selecting by clicking on the view icon. Users can go back any time by clicking the “Back” button on the top left of the portal.



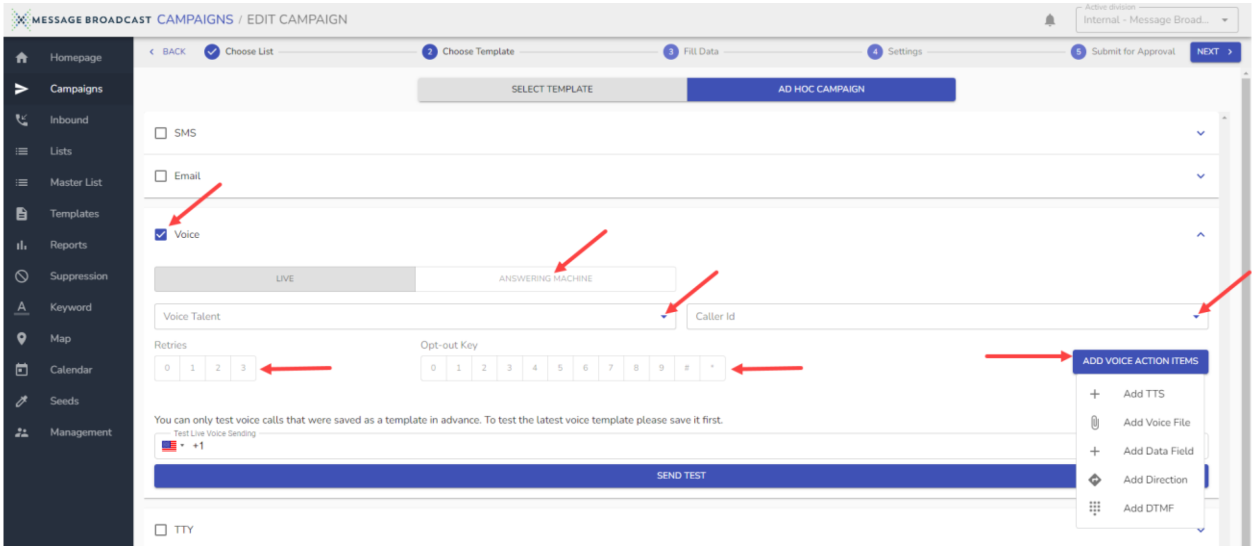
AD HOC CAMPAIGNS

To create an Ad Hoc Campaign, click on the “Ad Hoc Campaign” button at the top of the portal. Next, provide the content for each of the applicable channels (SMS, Email, Voice, TTY, or Custom).



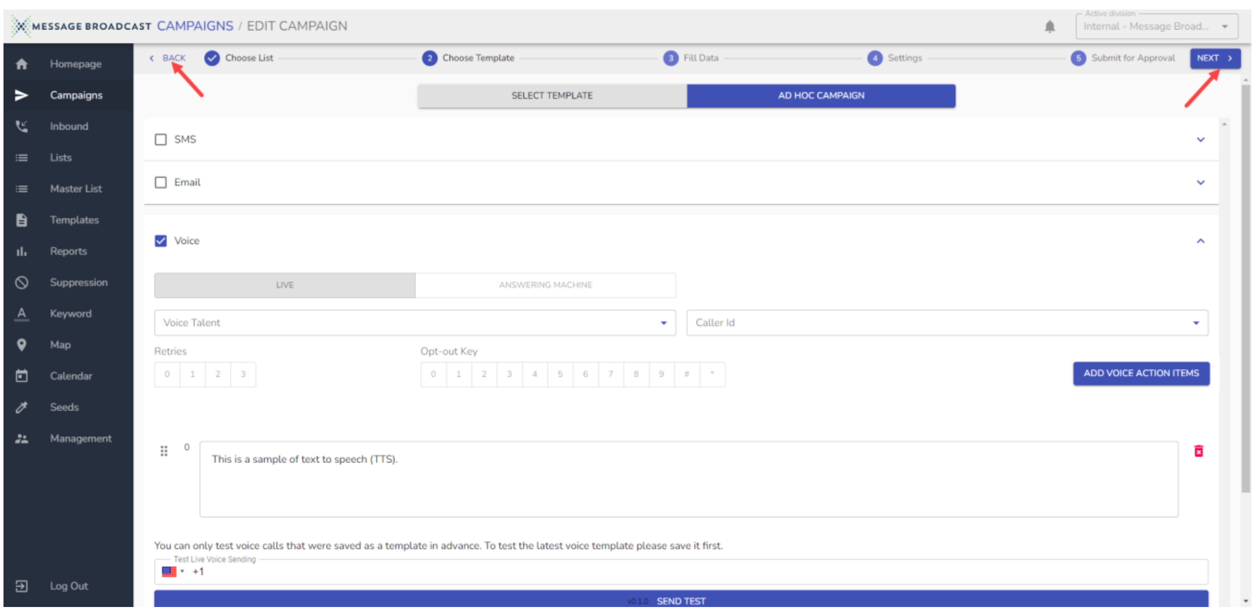
For example, for the voice channel, select the voice talent, caller ID, number of retries, opt-out key, and add the appropriate voice action items from the dropdown.

If you have a different answering machine message than what is used for a live voice call, please provide the content by clicking on “Answering Machine.”



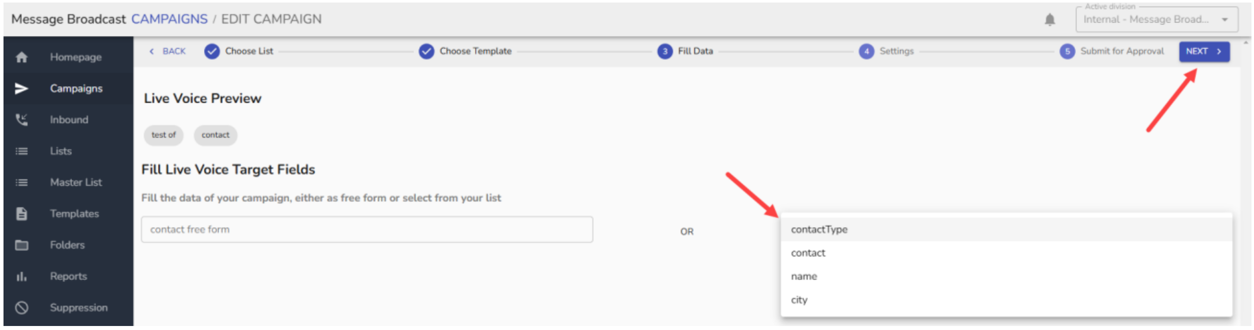
Note: For detailed steps for SMS and Email channels please go to Templates.

Then click “Next.” You can go back at any time by clicking the “Back” button on the top of the page.



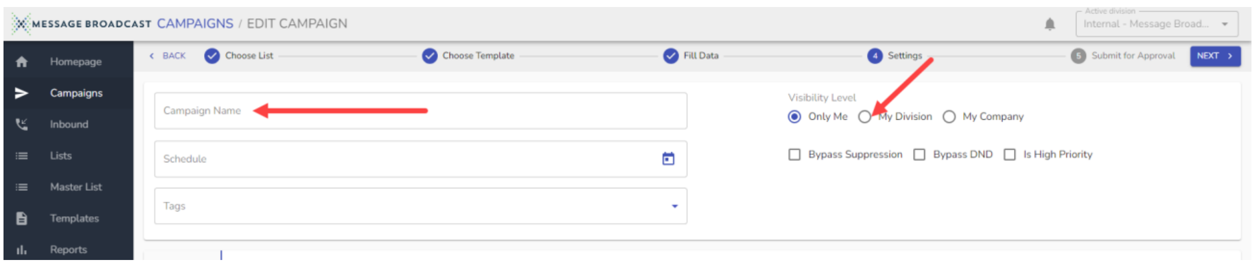
FILL DATA

After clicking “Next” on the previous page, users will see the preview for selected channels and will map their customer data variables to the information available from the selected recipient list. Once completed, click “Next” on the top right corner of the portal.



SETTINGS

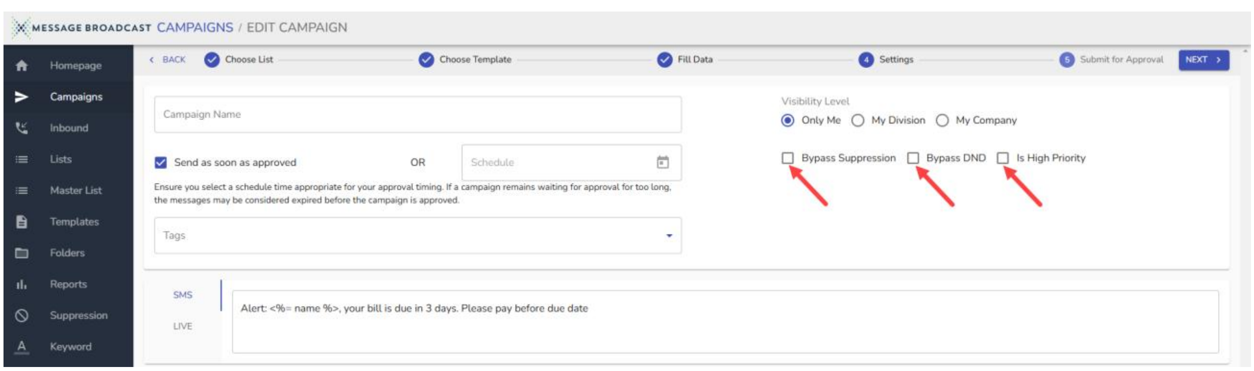
Next, enter a Campaign Name and select the Visibility Level. The Visibility Levels displayed are based on your organization's configuration.



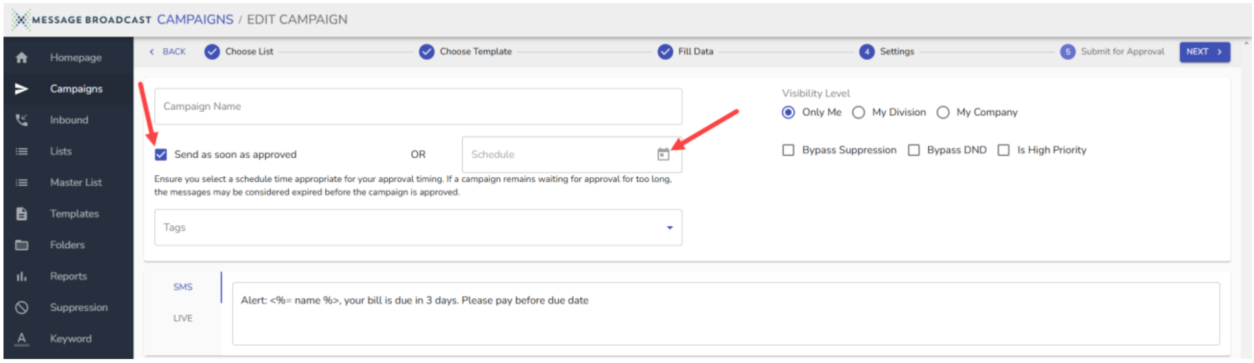
If you want to bypass the suppression list contacts at a campaign level, select Bypass Suppression.

Campaigns are not sent during times for which Do Not Disturb has been configured. Should an emergency communication need arise, checking "Bypass DND" will allow the campaign to be sent without an administrator needing to remove the existing DND setting.

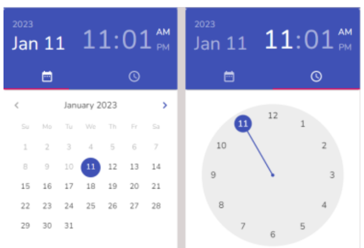
If you want to flag the campaign for high priority, select High Priority. This action allows you to set the priority as high allowing the system to send communications within this campaign first over other campaigns.



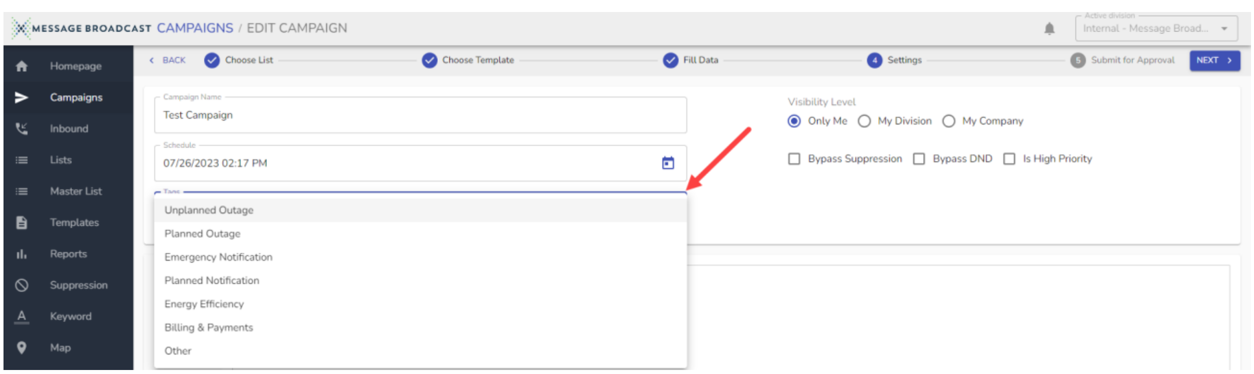
The next step is scheduling the campaign. By default, the "Send as soon as approved" checkbox is selected. This selection will launch the campaign as soon as it is approved.



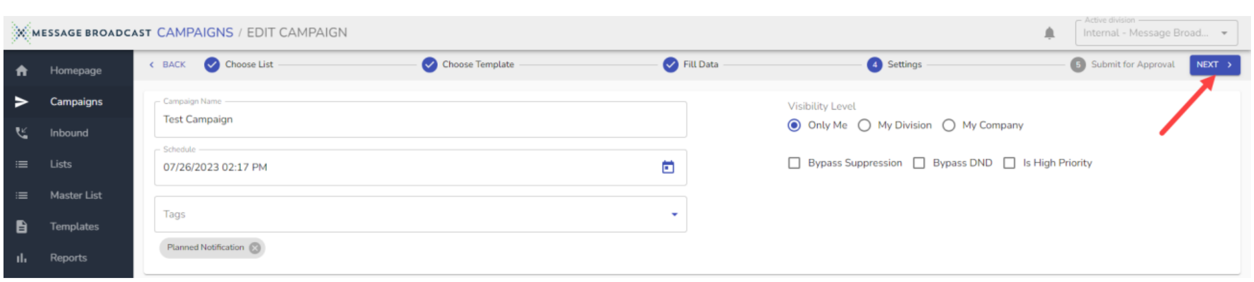
If you prefer to schedule the campaign for a later date and time, clicking on the calendar icon within the schedule box will open the date and time picker.



Finally, select one or more Tags for the campaign, e.g., Unplanned Outage, Planned Outage, Emergency Notification, Planned Notification, Energy Efficiency, Billing & Payments, or Other. This Tag is used for categorizing your campaigns and may be selected within the Search bar on the Campaign dashboard to find a specific campaign more quickly.



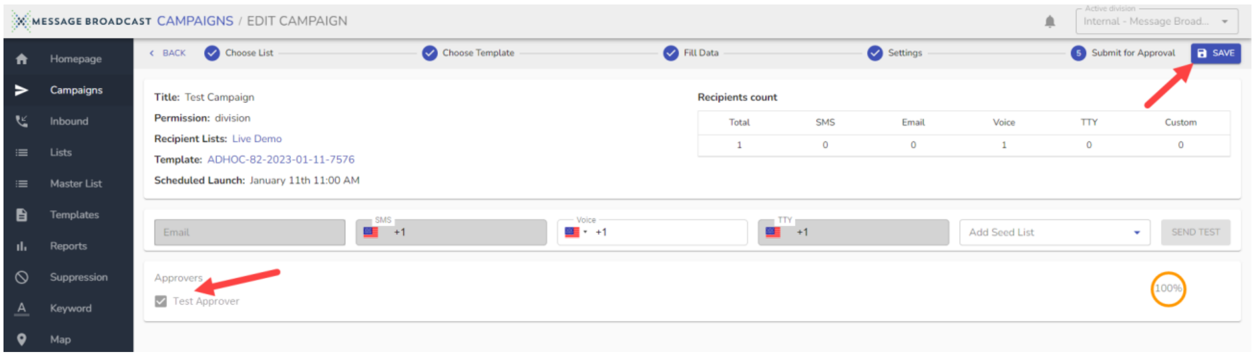
When finished, click “Next.”



SUBMIT FOR APPROVAL

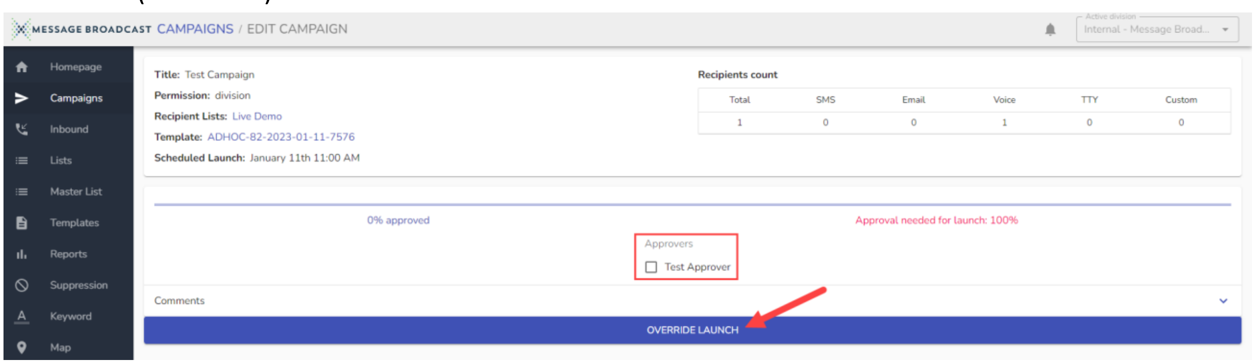
On the next page users can see the Campaign Summary and will be invited to send a test message by providing contact information and/or by selecting a Seed List from the Add Seed List drop down menu.

Select the Approvers from the campaign approver list and click “Save.” Based on your organization’s configuration, one or more approvers may already be selected for you.

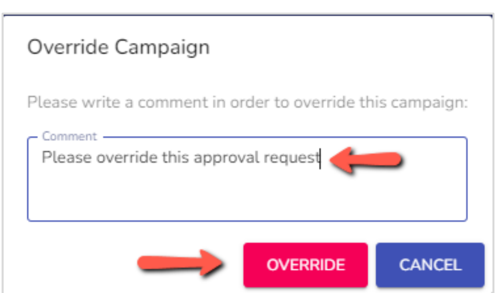


Note: A campaign may not be edited once it has been sent for approval.

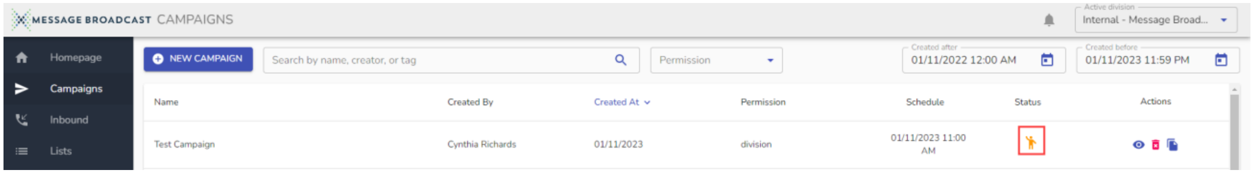
After clicking “Save,” users can navigate to the next page where they can choose to wait for approval or override the launch (if enabled).



Based on the organization’s configuration, users may bypass the approval process by clicking on “Override Launch,” entering a comment as to why the approval process is being bypassed and clicking “Override.”



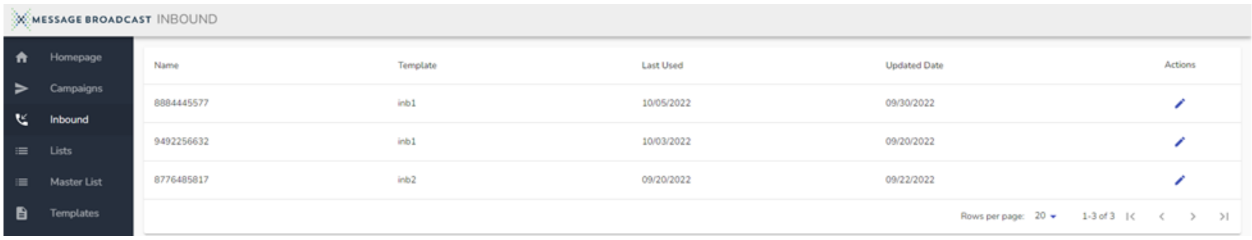
The Campaign appears on the campaign dashboard with its status.



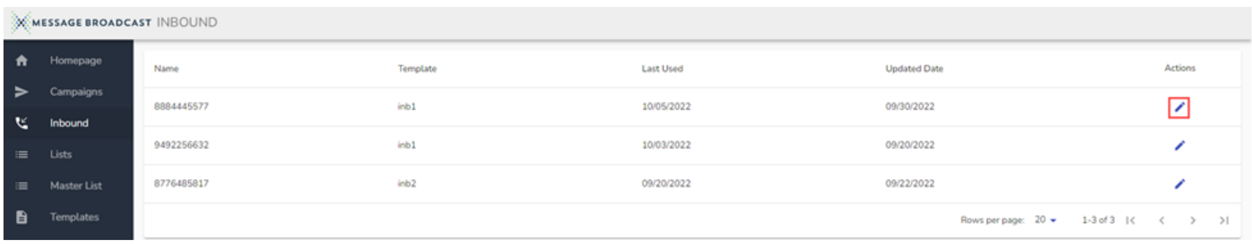
Note: A campaign may not be edited once it is in the “Waiting for Approval” status.

INBOUND

The Inbound section displays all Caller ID numbers to which returned calls are directed as part of a campaign, the template with which each number is associated, and the last used and updated date of the associated template.



You can view launched, or edit pending, campaigns associated with the selected Caller ID by clicking the Edit (pencil) icon in “Actions.”

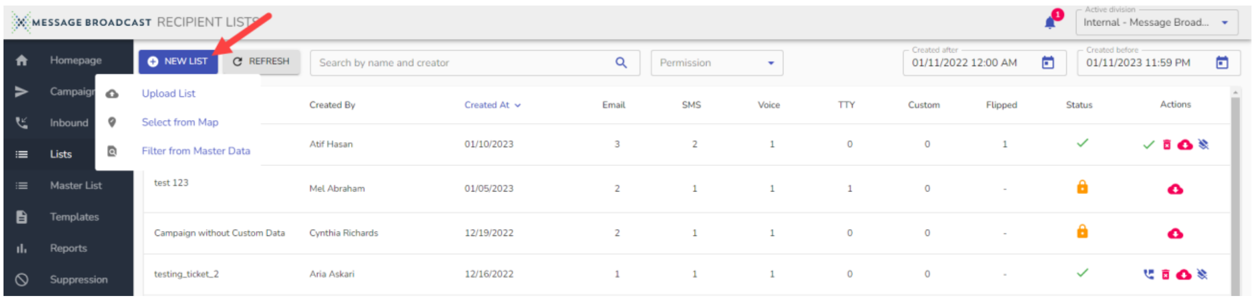


LISTS

Ingest structured and unstructured data from existing data sources to deliver contextual communications for an unlimited number of data segments.

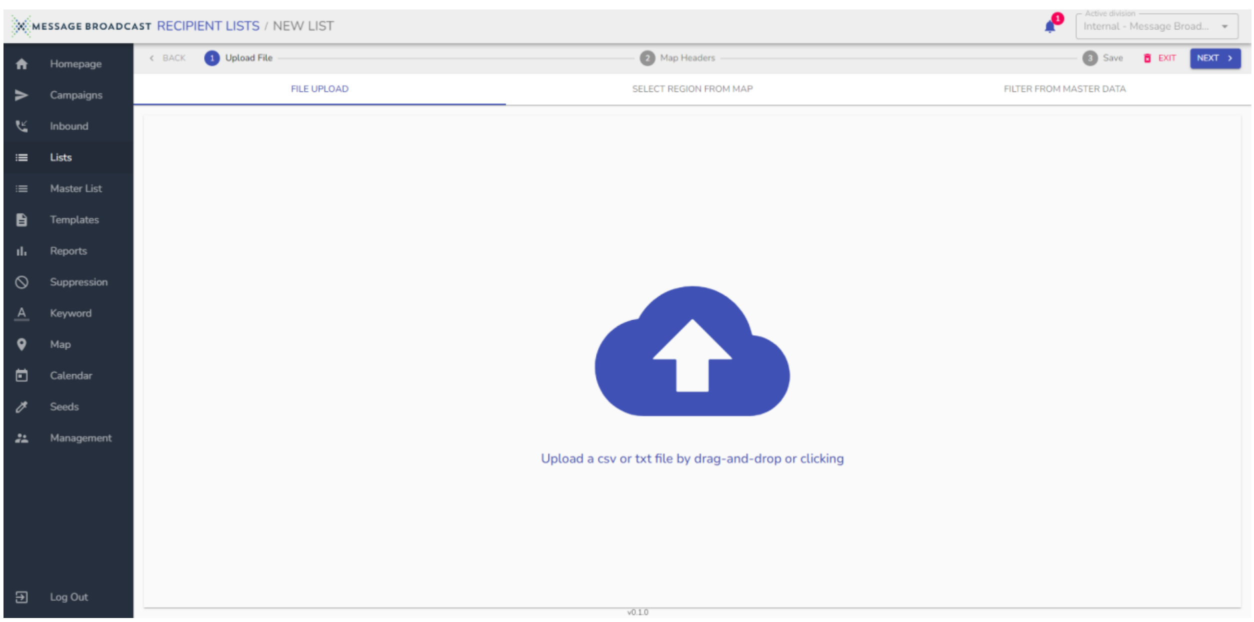
CREATE, VIEW, EDIT, AND CLONE LISTS

To add a new List, click the blue "New List" button. Based on your organization's configuration you may select Upload List, Select from Map, or Filter from Master Data.

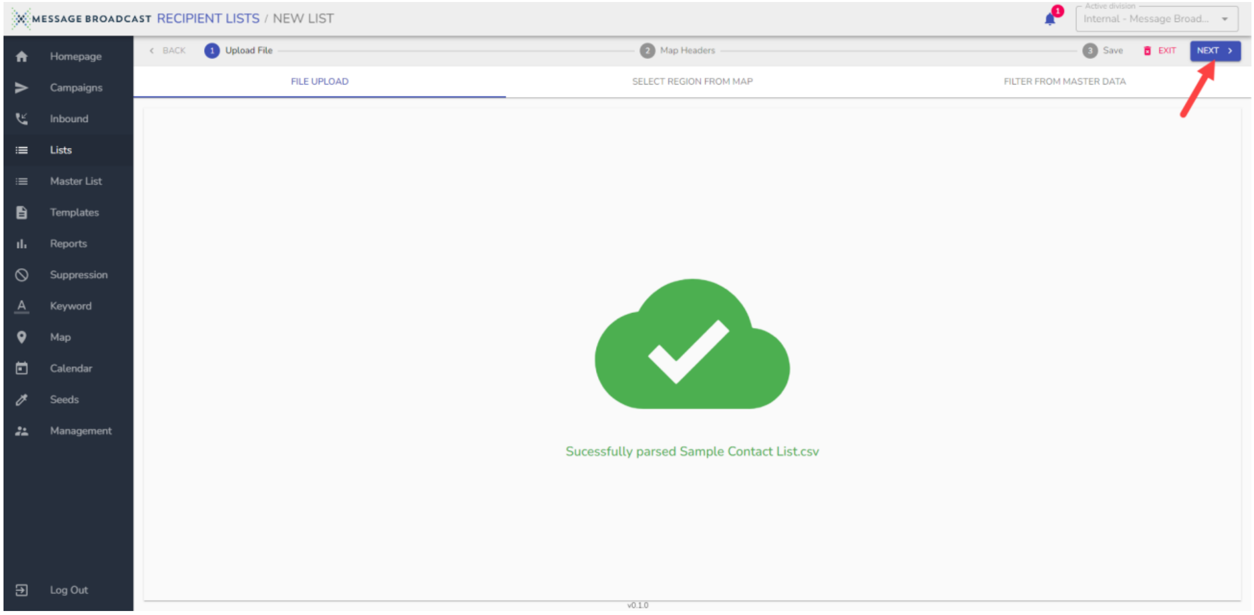


Next, upload your desired .csv or .txt file by clicking on or dragging the file to the cloud on the screen.

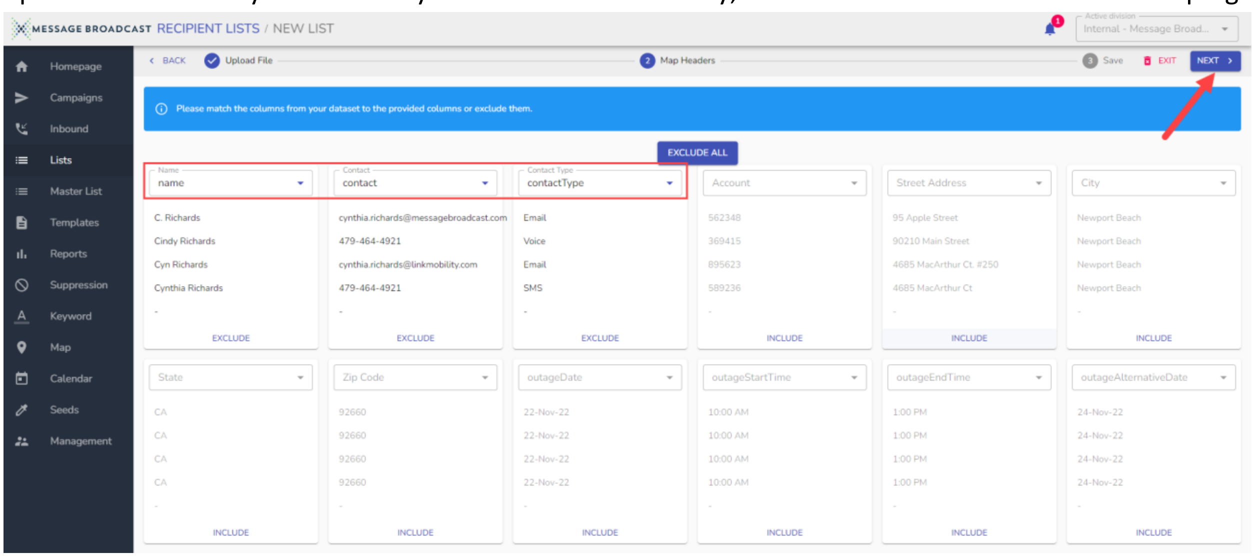
Note: EONS accepts mixed cases in the Channel Type values (For example: SMS, SMS, VOICE, voice, EMAIL, email, etc.)



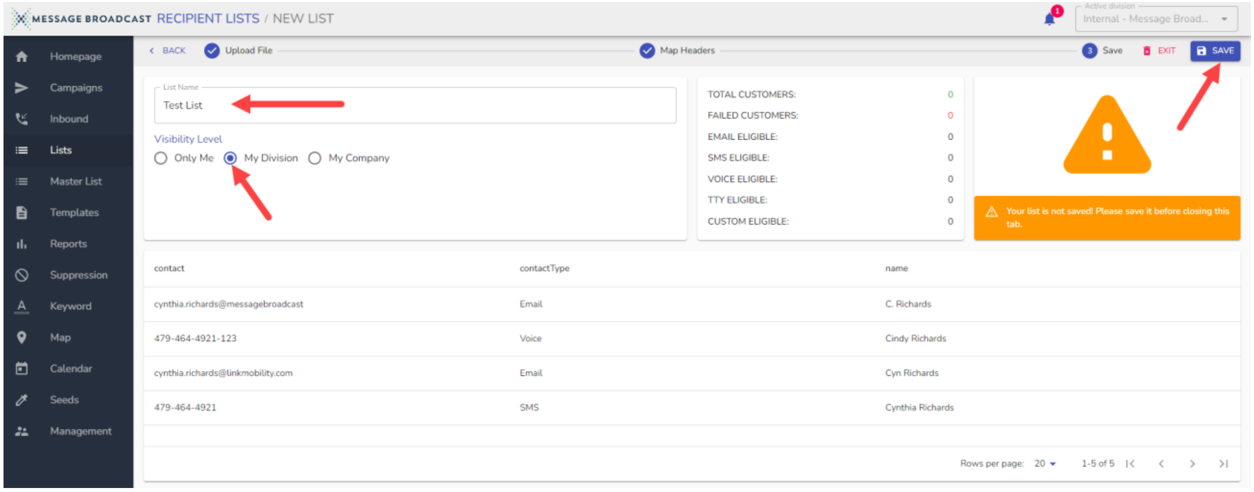
Click the blue "Next" button at the top right to continue. When uploaded successfully, the cloud will show a green checkmark icon.



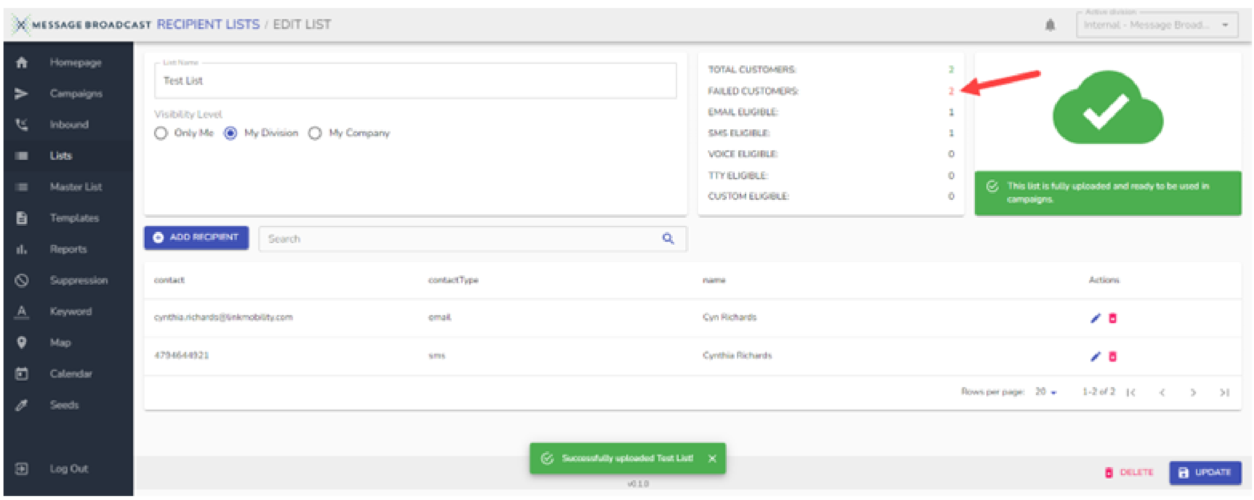
Users will then be prompted to map the fields in the .csv file to the fields in EONS. They will also be given the option to exclude any columns they do not want. Once ready, click the blue "Next" button at the top right.



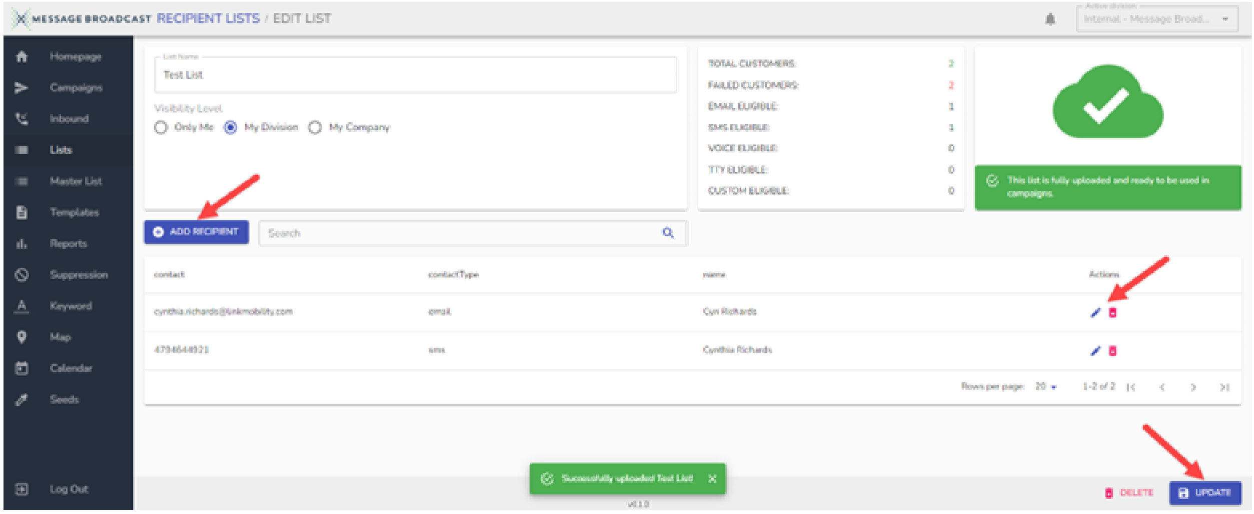
Users can now name the list, add a visibility level, and review the contacts on the list. When ready, click the blue "Save" button at the top right of the screen.



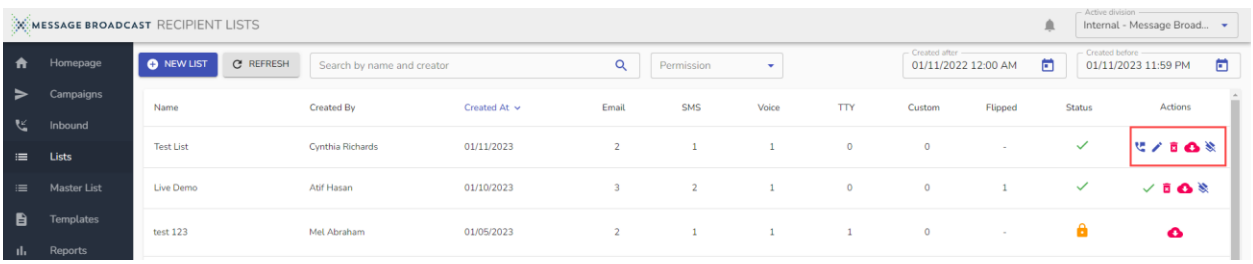
When successfully saved, the cloud will show a green checkmark icon. With advance validation, any records which contain incomplete or improperly formatted data will automatically be removed from the list. The number of records removed will be captured as “Failed Customers.” Users may download the list of failed customers, by clicking on the number next to “Failed Customers.”



You may also add new recipients to the list or edit or delete existing recipients from the list. Click “Update” to save your changes.



Users can also edit, delete, clone, or download a List using the icons under the “Actions” column and use the data validation and deduplication services (if enabled).

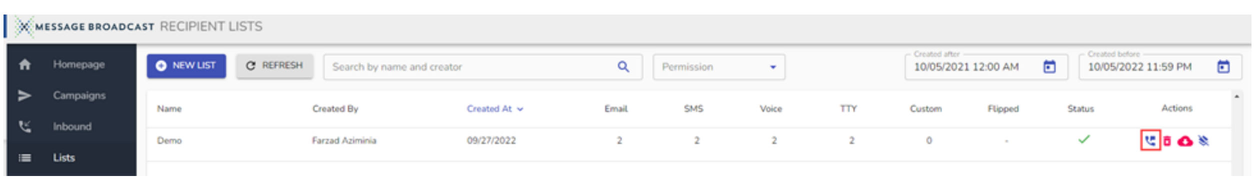


DATA VALIDATION AND DEDUPLICATION

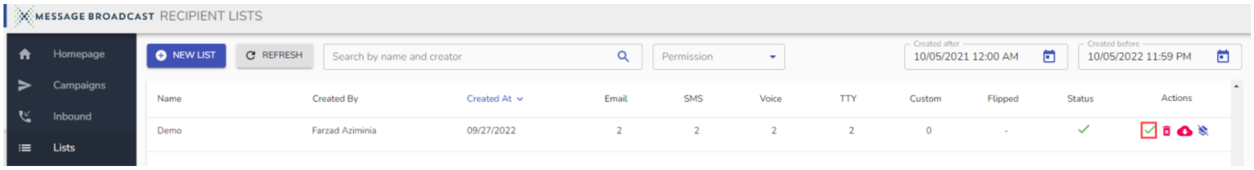
DATA VALIDATION

A user may screen the recipient data for any mobile phones with ‘voice’ device type and automatically update them to SMS by clicking on the “Data Validation” (phone) icon.

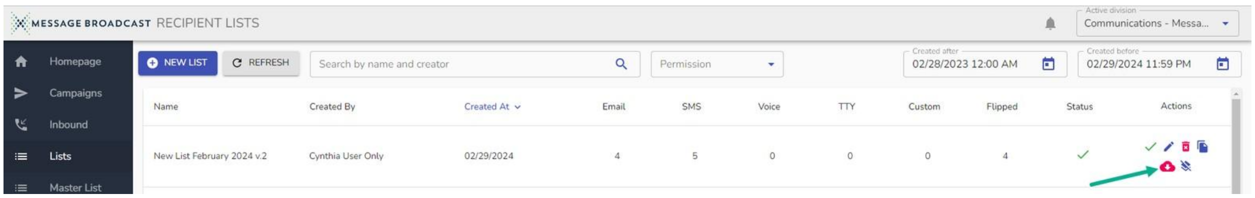
When the icon is blue, the numbers have not been validated.



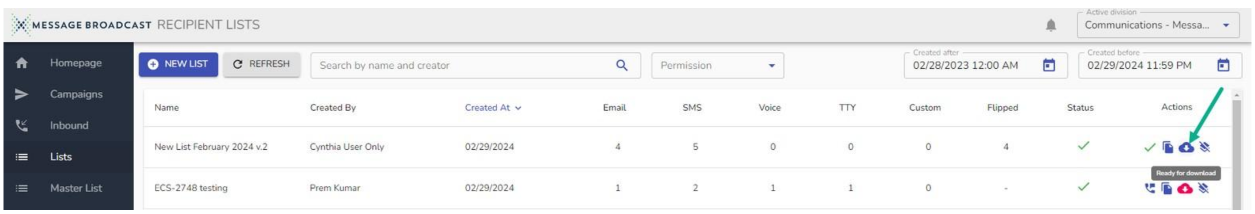
Once the data set has been validated, the icon will change to a green check mark.



Once the list has been validated, clicking on the red "Download" icon will queue the list for download.



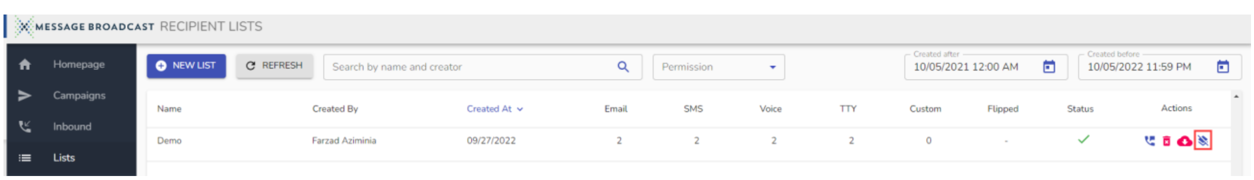
Once complete, clicking on the blue "Download" icon will download updated recipient list.

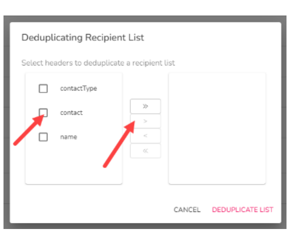


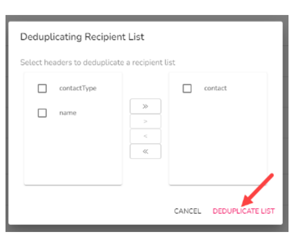
DEDUPLICATION

Duplicated data is present when an attribute has two (or more) identical values. The deduplication feature allows you to eliminate data based on different attributes as they appear in a list (uploaded or created from master data). The data is analyzed to identify duplicate entries based on the selected criteria and ensures the single instance (first record) is available in the final file.

To check for duplicate data, click on the "Deduplication" icon next to the list to be reviewed, then select one or more criteria (name, contact type, contact) upon which data should be reviewed for duplicates, and click "Deduplicate List."



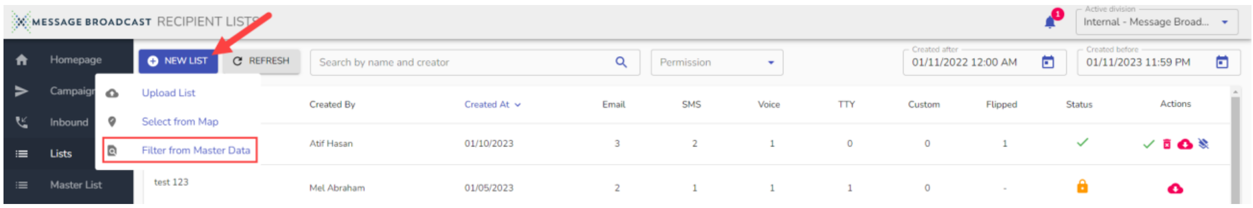




CREATING A LIST FROM THE MASTER DATA LIST

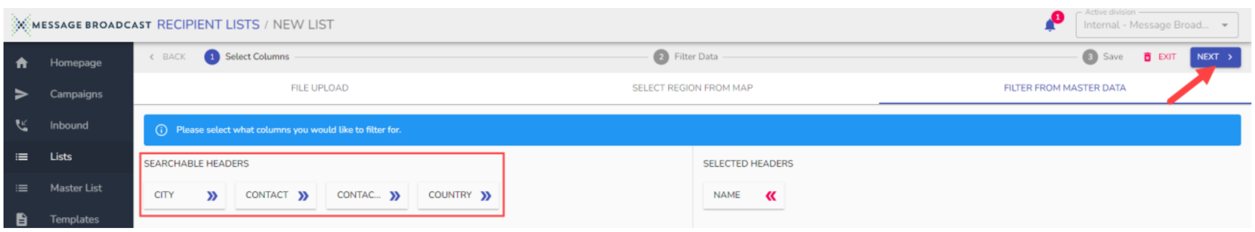
CREATE, VIEW, AND EDIT CAMPAIGN LISTS CREATED FROM MASTER DATA

To add a new List from the available Master Data, click the blue “New List” button. Next, select “Filter from Master Data” to begin list creation.

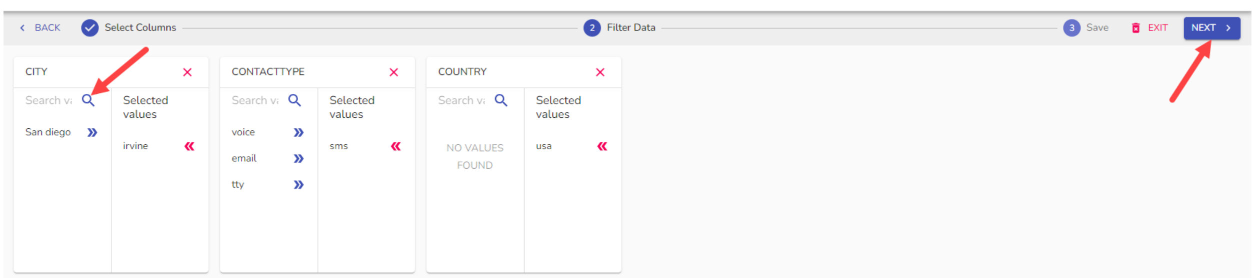


Single click all the required filter criteria to continue. You can select multiple criteria based on the customer base with whom you need to communicate.

The selected filter criteria will move to the “Selected Headers” section. Click the blue “Next” button at the top right to continue.

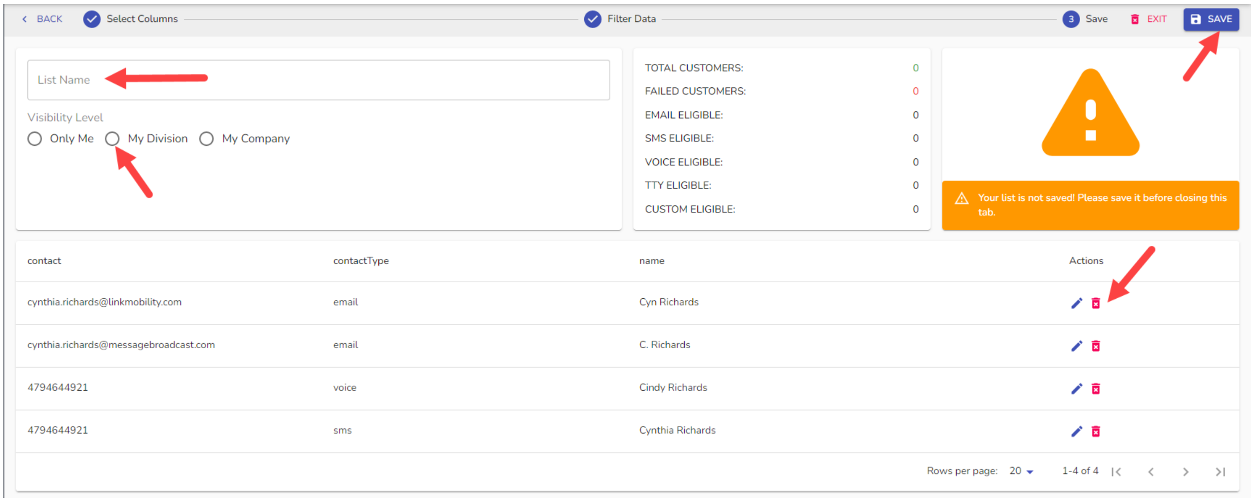


You can now select specific data within the filtered headers from Master Data by single clicking or using the search feature. Click the blue “Next” button at the top right to continue.



Users can name the List, select a Visibility Level, and review the information for the List.

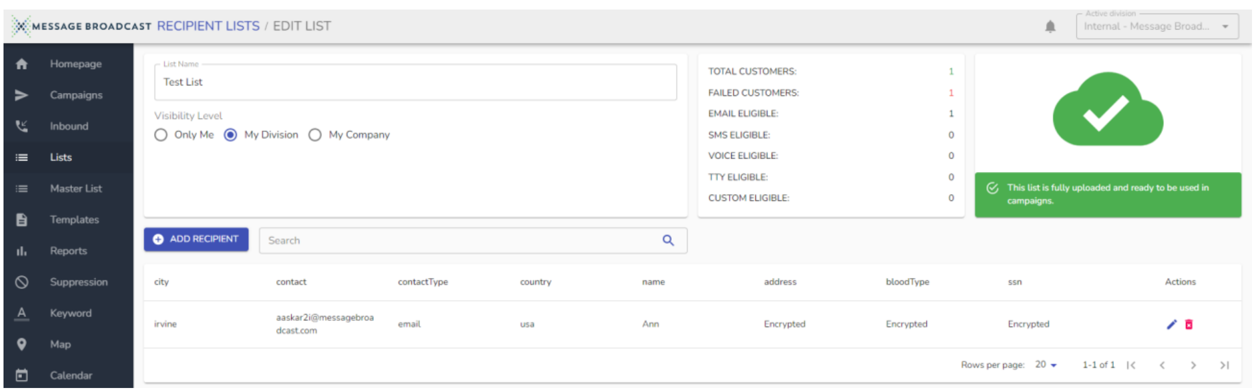
Note: The Visibility Levels displayed are based on your organization’s configuration.



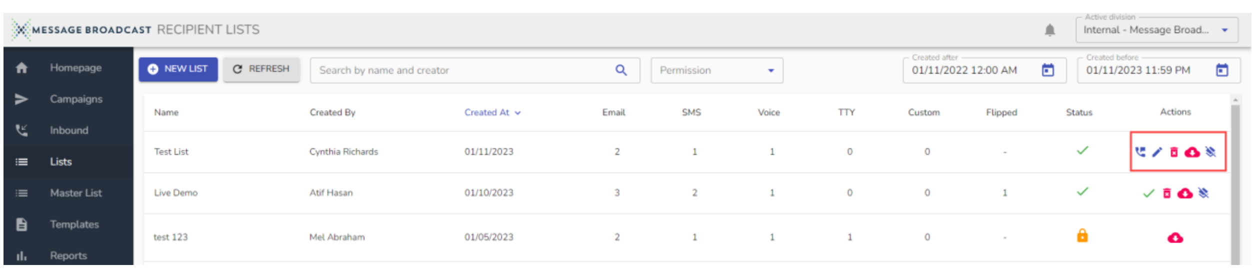
When ready, click the blue “Save” button at the top right of the screen.

Note: The import process starts once you click the blue “Save” button at the top right of the screen.

When uploaded successfully, the cloud will show a green checkmark icon.



Users can also edit, delete, or download a List using the icons under the “Actions” column and use the data validation and deduplication services (if enabled).

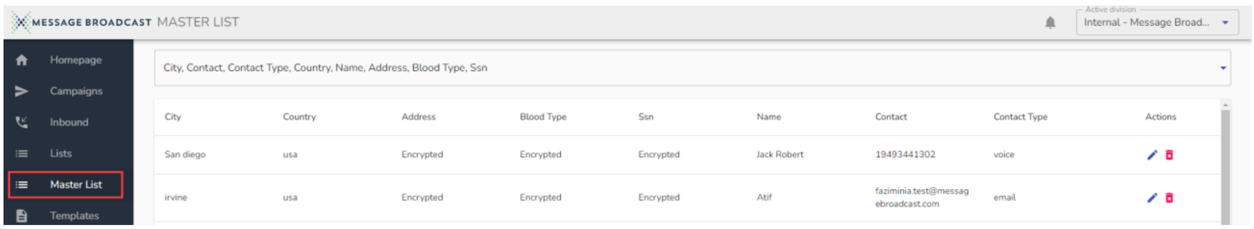


MASTER LIST

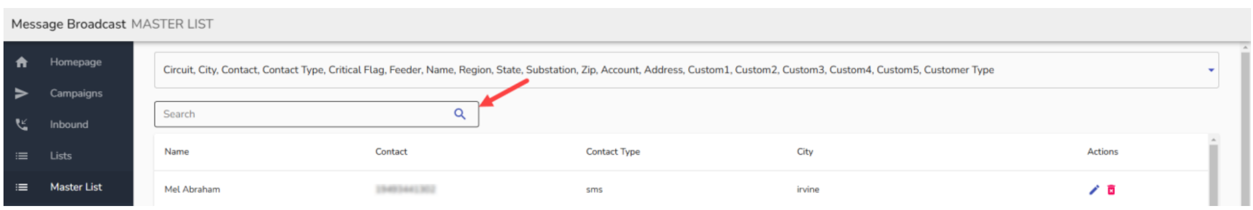
The Master List is the list of all available contacts / message recipients. Availability of the Master List depends on your organization's configuration.

VIEW / EDIT MASTER LIST

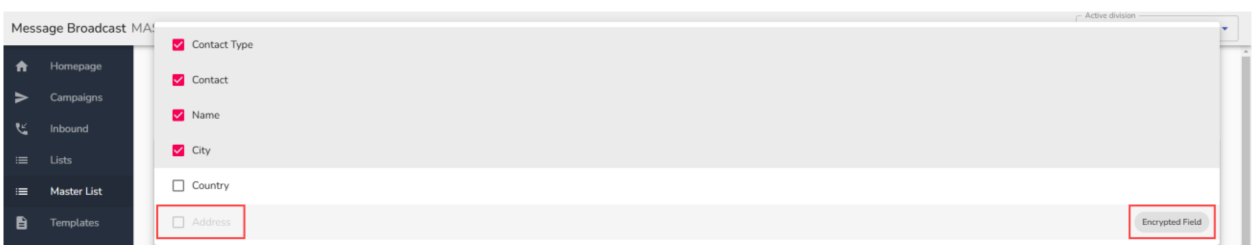
View and edit all recipient contact information contained in the Master List (which may include name, address, city, country, contact type, contact, or any other data element chosen by your organization).



To search the master list for specific customer information, type the search value into the "Search" field to return the matching master list records.



When selecting filter criteria within the Master List, encrypted fields will be shown but not available for selection.



TEMPLATES

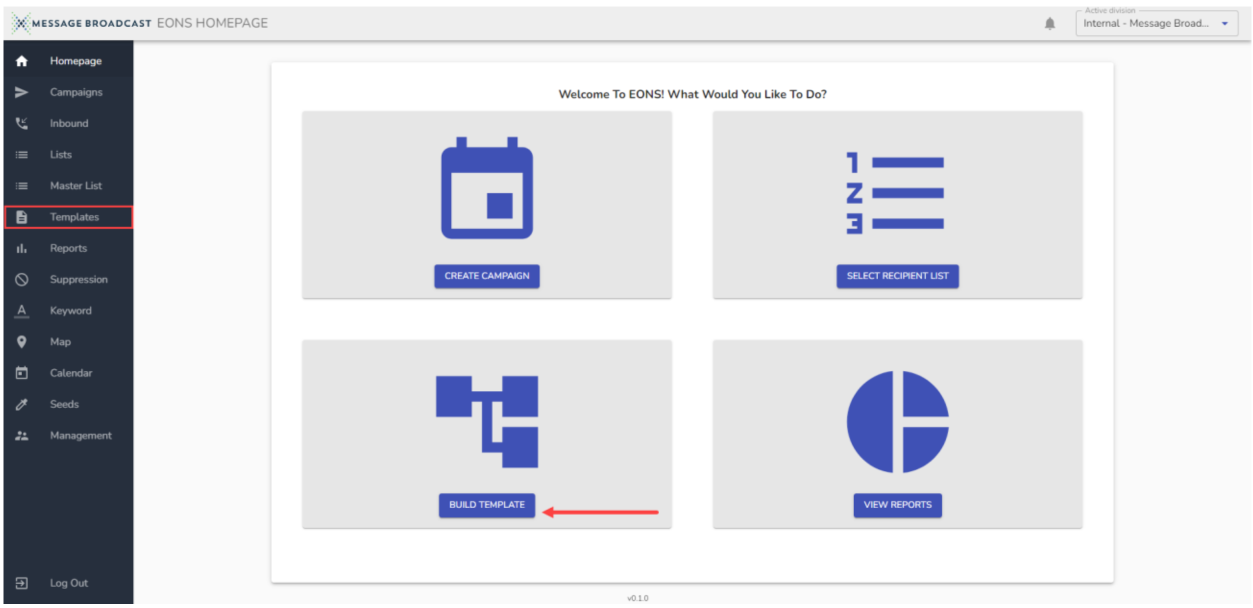
The build template feature in EONS allows on-the-fly creation of fully custom SMS, E-mail, and Voice Templates.

TEMPLATE DASHBOARD

HOW TO CREATE, CLONE, SEARCH, EDIT AND DELETE TEMPLATES

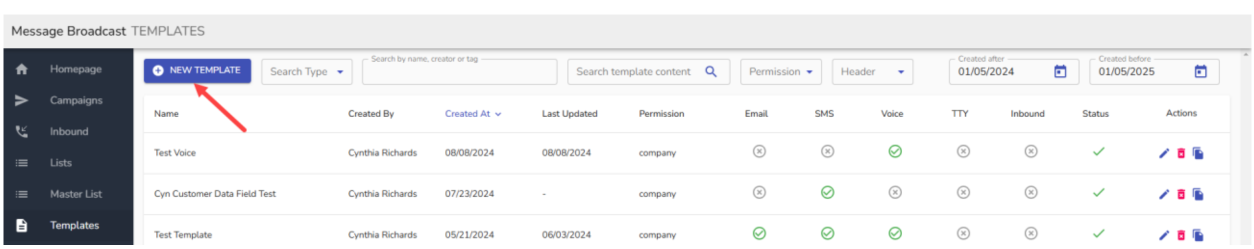
Deploy customer communications quickly and efficiently using campaign templates aligned to your playbook.

The Build Template feature in EONS allows for “on-the-fly” creation of custom SMS, Email, Voice, and Inbound Templates. Create a Template by clicking on the large “Build Template” icon on the portal home page or click “Template” in the left-hand menu and navigate to the template landing page.



CREATE TEMPLATES

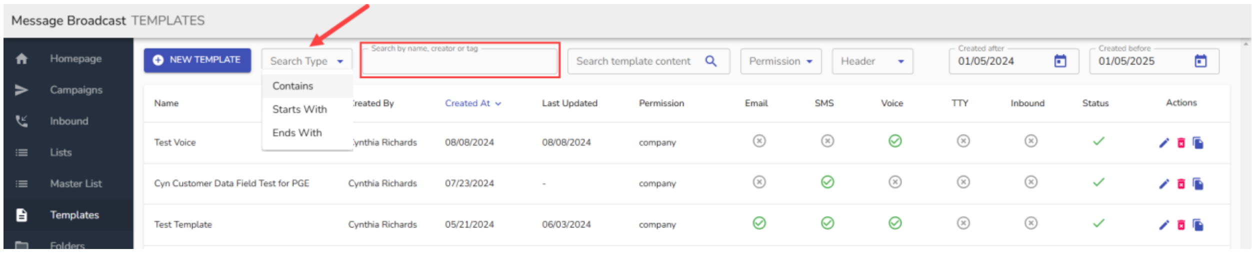
Start by clicking the blue “New Template” button at the top left of the portal. All previously created templates are also available to view in this section.



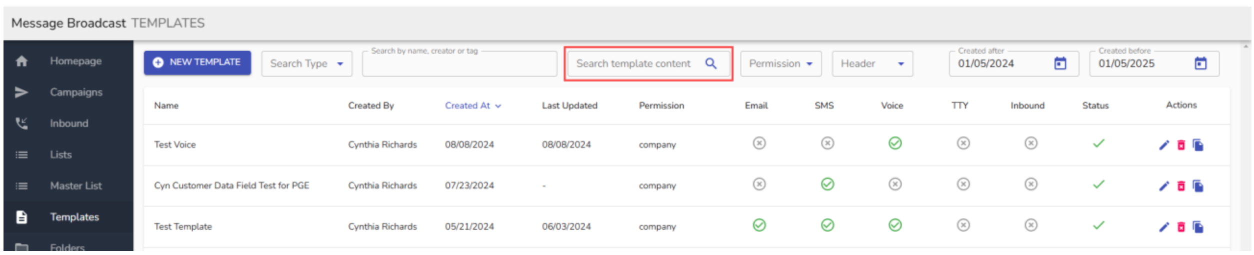
For detailed steps on how to build templates for each channel please visit the respective template sections (Voice Template, SMS Template, Email Templates, Inbound Template).

SEARCH TEMPLATES

Users can search existing templates in multiple ways. The "Search Type" allows the user to enter the name, creator, or tag the template contains, starts with, or ends with.

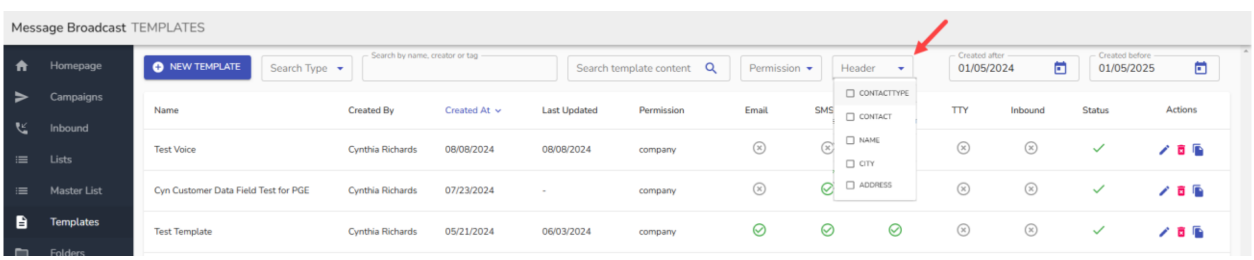


Users may also search by template content. Typing a value in the "Search template content" box will allow the user to find templates which contain a phrase or string within any of the template's messaging channels.



You may also search by visibility permissions: User, Division, or Company (based on the organization's configuration).

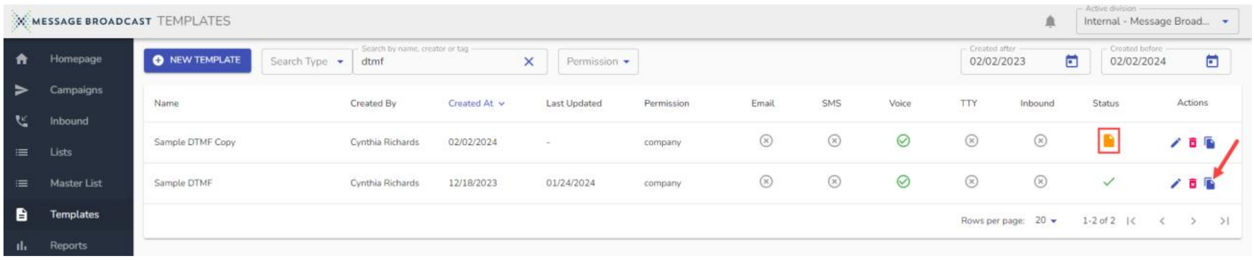
To find templates which contain specific recipient list variables, or "Customer Data," select the field name from the "Header" dropdown.



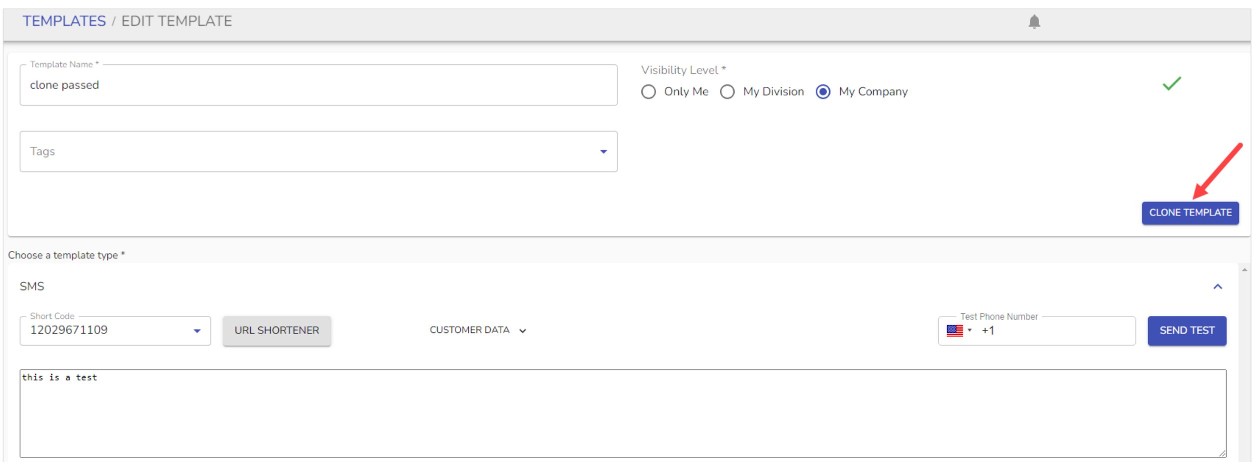
The search criteria can additionally be narrowed down by dates via the "Created after" and "Created before" fields, which default to show templates created within the last year.

CLONE TEMPLATES

Users can clone existing templates by clicking on the “Clone” icon under “Actions.” This action allows users to clone existing templates including script data. Once cloned, a copy is created in the template dashboard in draft status with “Copy” appended to the end of the template name.

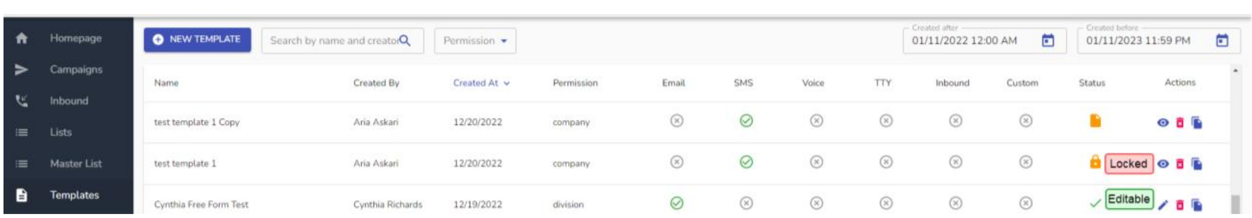


Templates may also be cloned by clicking the “Clone Template” button at the top of the template screen. This option allows the user to review the contents of the template prior to choosing to clone it.



EDIT TEMPLATES

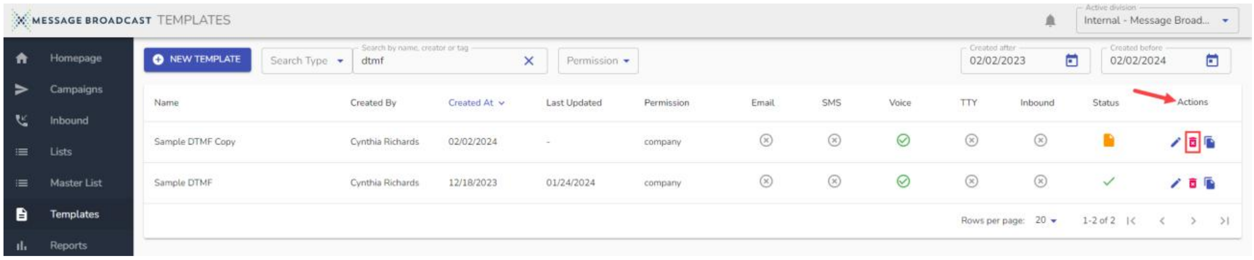
Templates can be edited, if they have not been used in a campaign launch, by using the edit widget under “Actions.” Once used to launch a campaign, templates are locked for further editing.



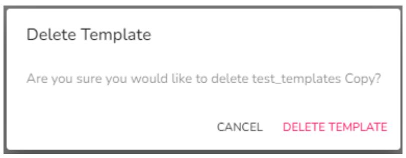
Note: Once any template is edited, users must re-publish the templates by clicking the “Update” button to refresh the content changes. If edits are not updated, the changes will not take effect during a campaign launch.

DELETE / ARCHIVE TEMPLATES

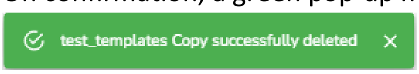
Unlocked Templates can be deleted by clicking on “Delete” (trash can) icon under “Actions.”



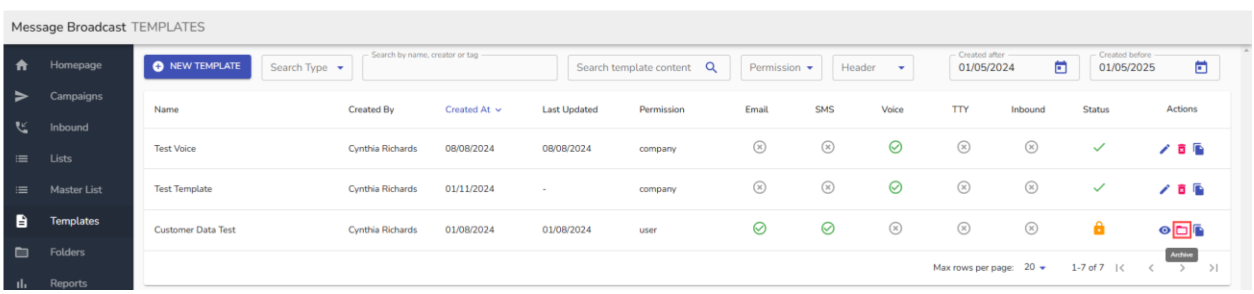
After clicking the icon, a message pops up asking to confirm the template deletion / archival.



On confirmation, a green pop-up message confirms the successful file deletion.

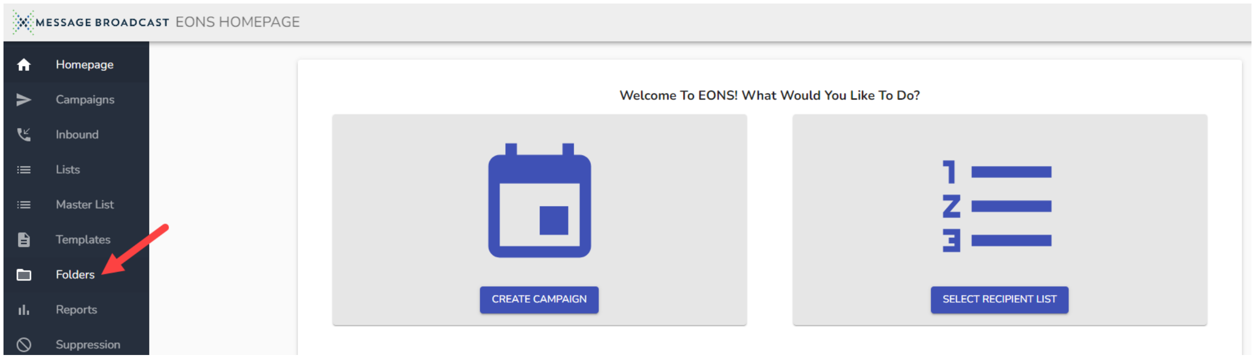


Locked Templates may be archived by clicking on the “Archive” (folder) icon under “Actions.” Archived templates are no longer visible on the template dashboard but can be restored with a Help Desk ticket.



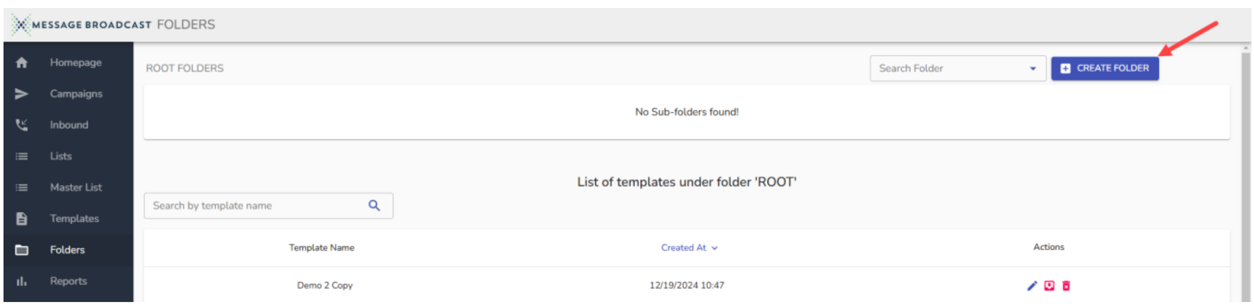
ORGANIZE TEMPLATES WITH TEMPLATE FOLDERS

Users can create Folders in which to store and organize Templates. Click on the “Folders” option in the left navigation to open the Folders screen.

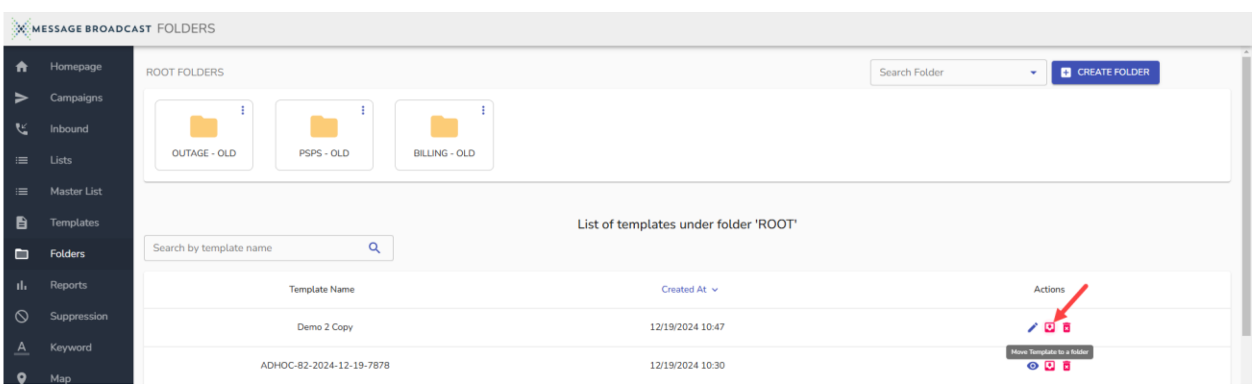


All existing Templates will be displayed under the “Root” folder until they are organized into other folders.

Create new folders by clicking on “Create Folder.”



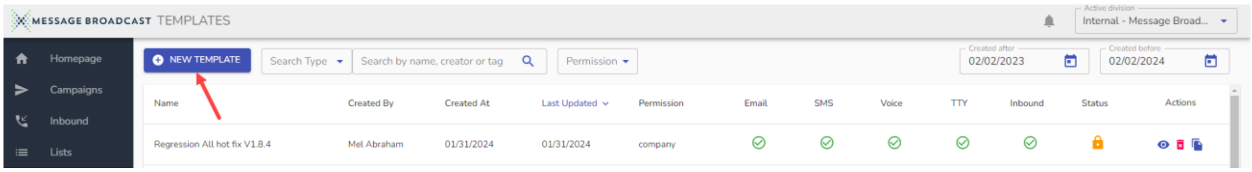
Once Folders have been created, Templates can be moved into the appropriate folder by clicking the “Move Template” icon within “Actions.”



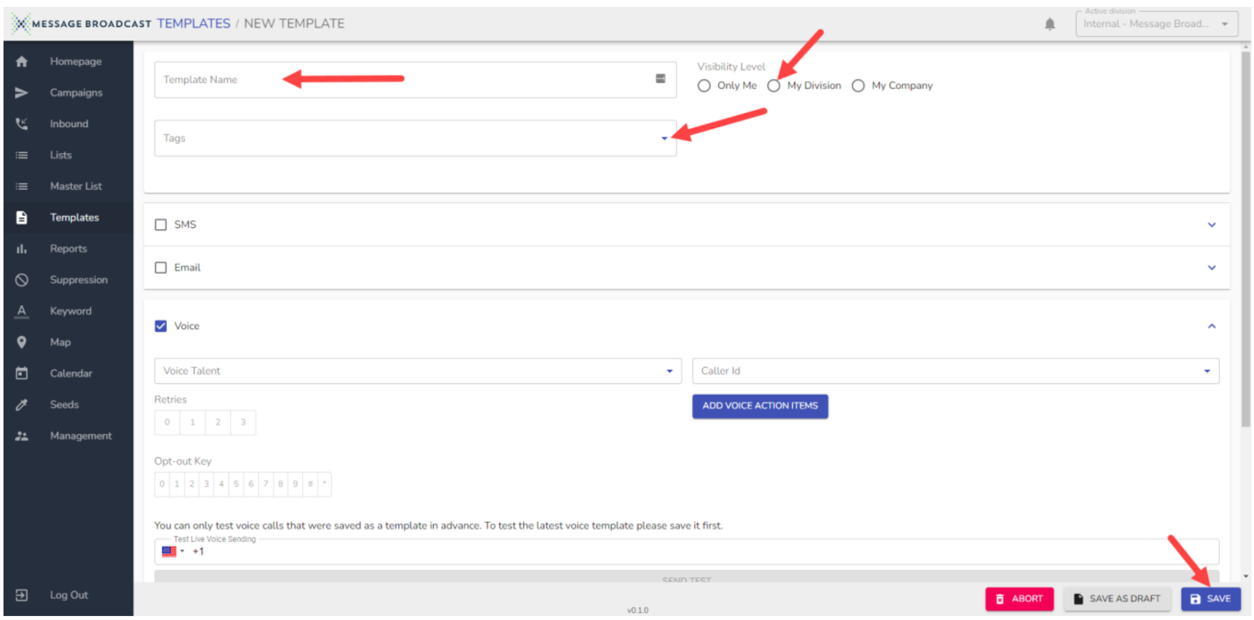
VOICE TEMPLATES

HOW TO BUILD VOICE TEMPLATES IN EONS

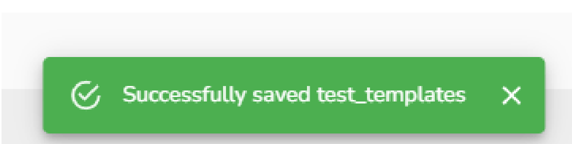
Click on the “New Template” button to create a new template.



Enter an appropriate Template name, select the visibility level/permissions, select one or more Tags to categorize the template, and choose at least one channel to save the Template.

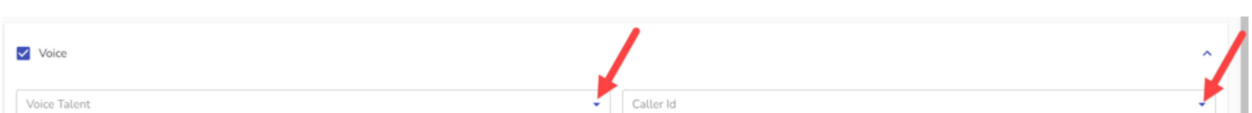


Once this information is provided, click on “Save” to save the template. A success message will then pop up.



CREATING A VOICE TEMPLATE

Select “Voice,” then select the voice talent, to be used for all text-to-speech (TTS) included in the template, from the Voice Talent drop down, and select the Called Id that will be displayed from the dropdown.



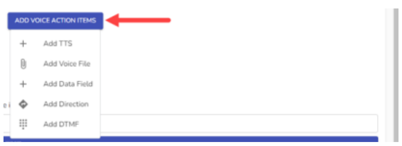
Note: Custom descriptions for each available voice talent may be specified upon request. Please reach out to your account manager, or submit a help desk ticket, for more information.

You may select the number of retries, allowing redials for previously failed calls, using the retries option.

You can also designate a key as an "Opt-out" key. Once the customer presses that key, they will be added to the voice suppression list. To use this feature, add instructions to your voice script via TTS like "To opt-out of future communications, press X." To ensure the opt-out is appropriately captured, opt-out instructions should not be placed at the end of the template as the call could end before the customer has time to respond.

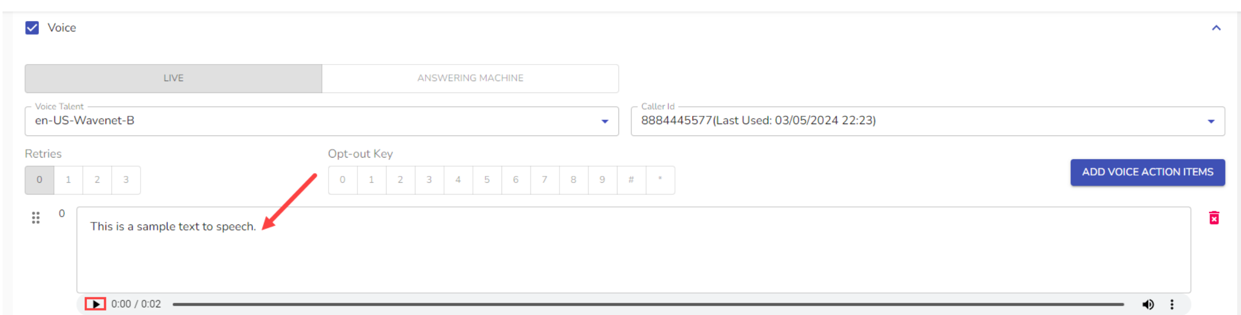
Add Voice Action Items

Build the voice flow by selecting one of the action items below.



Add TTS

This action allows users to type or copy-paste your script into a content box for simple voice template creation. To preview how the entered text will sound being read by the selected “Voice Talent,” click on the “Play” icon.



You can delete the TTS element by clicking on the “Delete” (trash can) icon.

Add Voice File

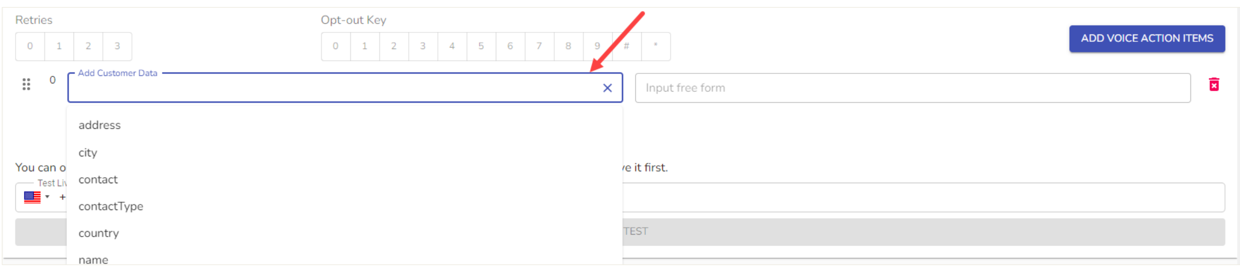
This action prompts users to add an audio file by either clicking on the Up arrow or by dragging and dropping a file into the space.

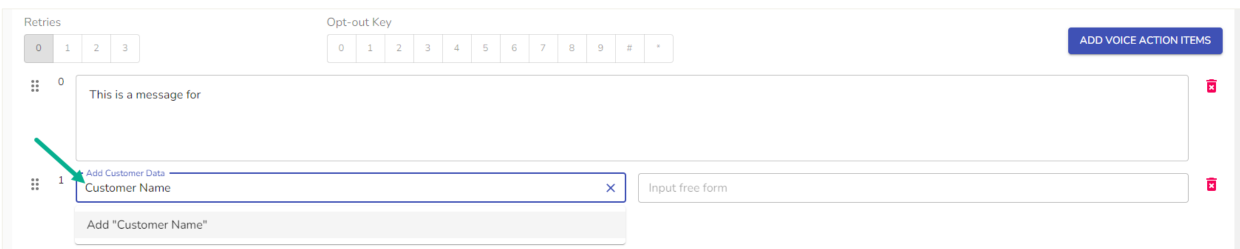
Once uploaded successfully, you can see the uploaded file. Replace the file by clicking the up arrow or delete the uploaded wav file by clicking on the “Delete” (trash can) icon.

Note: The voice file must be in .WAV, .mp3 or .ogg file format ONLY.

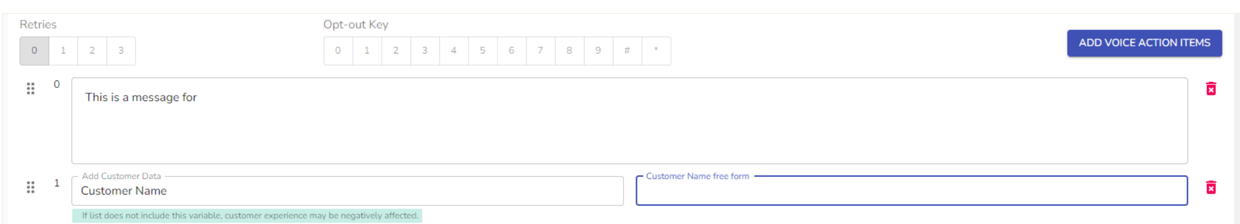
Add Data Field

This action allows users to select variables from the “Customer Data” dropdown or type the name of the new variable into the “Add Customer Data” field.





When the template is used for a campaign, any new data fields will need to be mapped to the corresponding field in the recipient list.

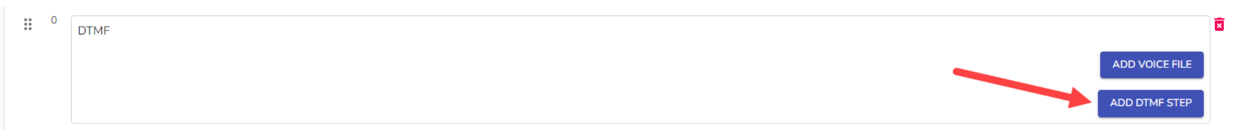


Add Direction

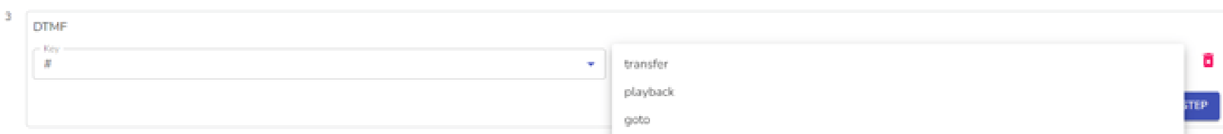
Adding directions enables users to create a flow within the Voice template by directing them towards the next step. You may select the next step in the flow by selecting **Go to** option.

Add DTMF

Adding DTMF enables users to introduce key press options within the Template. Clicking on the “ADD DTMF STEP” button selects the "key" and the respective action that the KeyPress must perform.



Once the key is assigned to perform a certain action, it is no longer available in the drop-down menu. DTMF can perform 3 actions: transfer, playback and go to.

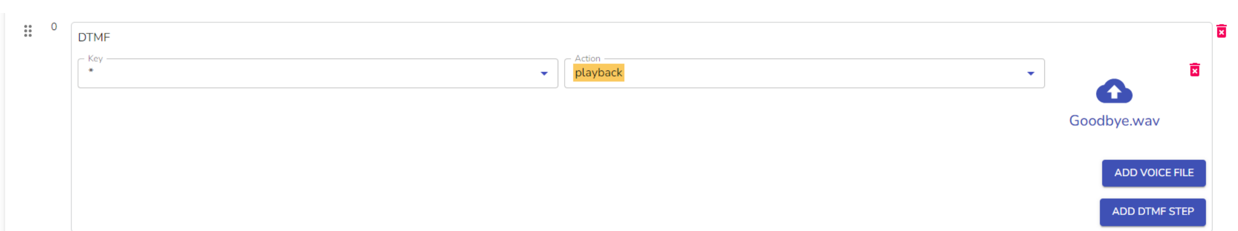


Transfer allows transferring calls to a predetermined number such as your call center. Users must provide a Transfer number in the Phone input box.

For example: Users may select Press # to transfer to the 1 (800) 800-8000 number as shown below.

Playback allows users to play a different script on KeyPress. Users must provide an appropriate .wav file to be played back to the end user/customer.

For example: Users can select the press * option to end the call and play back a Goodbye message, as shown below.



Goto - This action allows you to skip the voice call flow to any other steps that were already laid out during the Voice template creation process. You must select the "Go to Step" from the drop down.

For example: The KeyPress 9 takes you to Step "2" in the Voice flow.

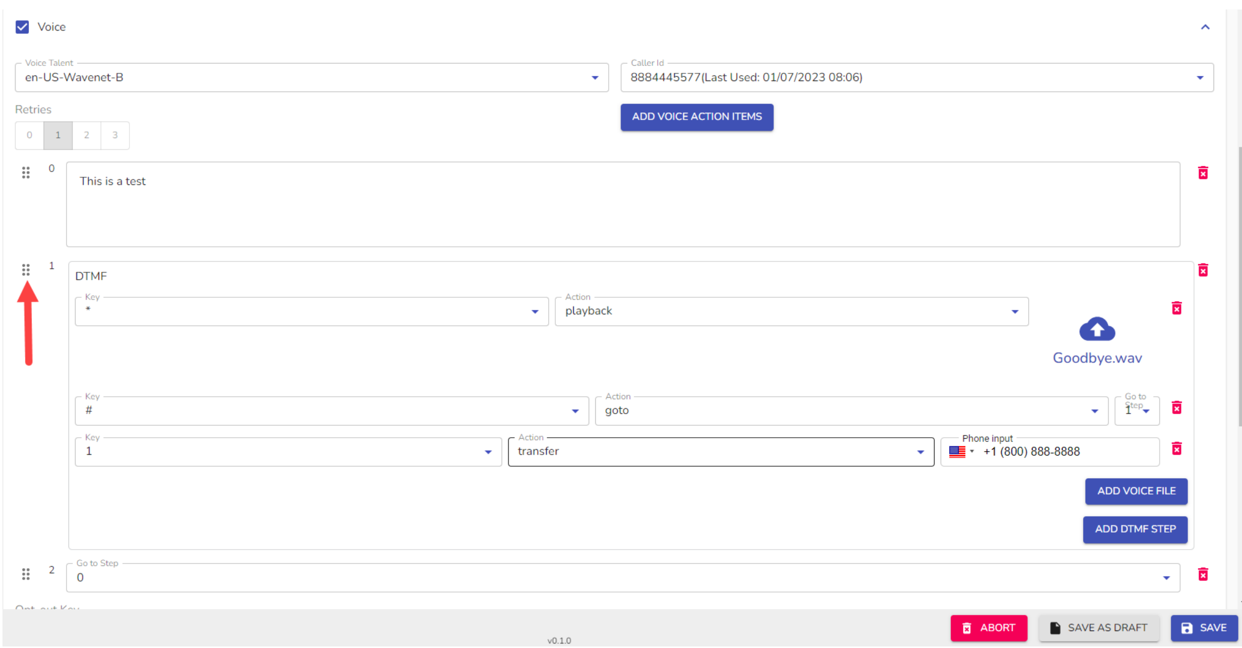
You may add as many DTMF options until all the KeyPress options are exhausted in the drop-down menu.

Once set up, save the updates by clicking the "Save" or "Update" buttons as applicable during the process of template creation.

Note: You can only test voice calls that were saved as a template in advance. To test the latest voice template, save it first.

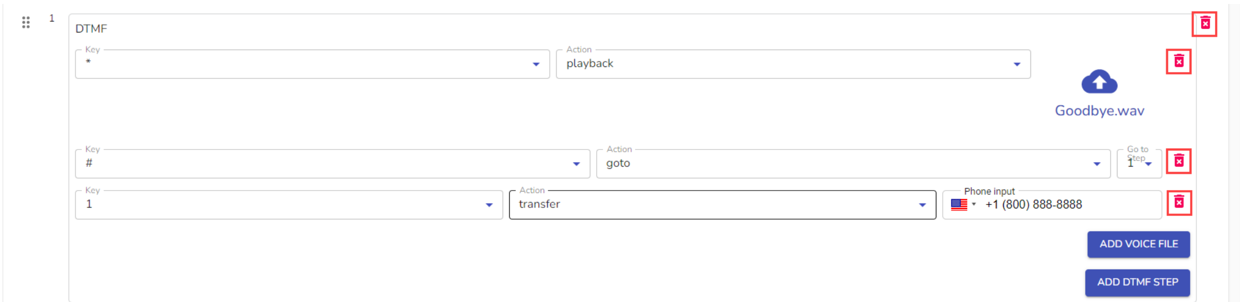
Move Steps

At any time, users can modify the Voice template flow by moving the steps around via the dot icon on the left navigation menu. Click the "Drag and Drop" (dots) icon to move the steps as needed.



Delete Steps

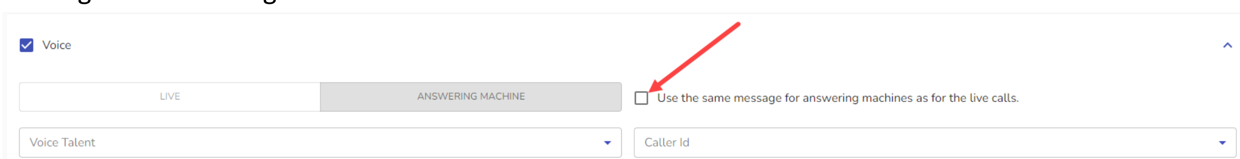
During the process of Voice template creation, users can delete any step by clicking the "Delete" (trash can) icon.



ANSWERING MACHINE SET UP

Users can create a separate Answering Machine message when there are different messages for voicemails versus live calls. Click on the "ANSWERING MACHINE" tab to set up a distinct voicemail template.

To copy over the "LIVE" voice workflow to the "ANSWERING MACHINE" workflow, click the "Use the same message for answering machines as for the live calls" checkbox.

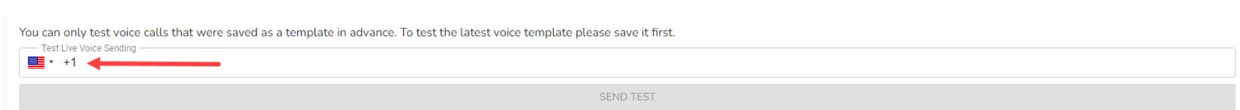


Since voicemails are not interactive, DTMF steps will not copy over from "LIVE," and the options available in the "ANSWERING MACHINE" workflow will be limited to "Add TTS," "Add Voice File," and "Add Data Field."

Note: At any time, users can update, edit, and delete templates. Once a template is edited, users must re-publish the templates by clicking "Update" button to update the content changes.

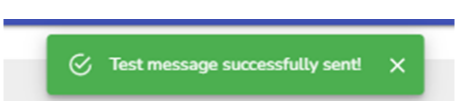
VOICE TESTING

Once the template is saved, users can input a number in the "Test Live Voice Sending" field and send a test call to verify that the template set up plays Live calls as expected.



Note: Only the "LIVE" voice messaging will be played even if the test call is sent to voicemail.

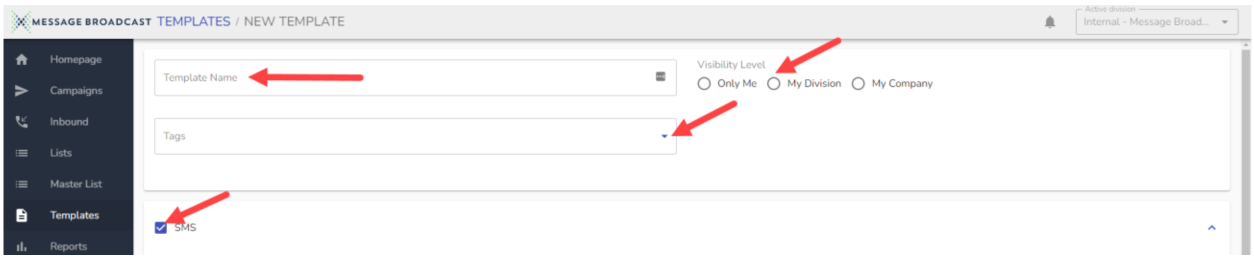
Once a user sends the test call, a pop up appears confirming the test.



SMS TEMPLATES

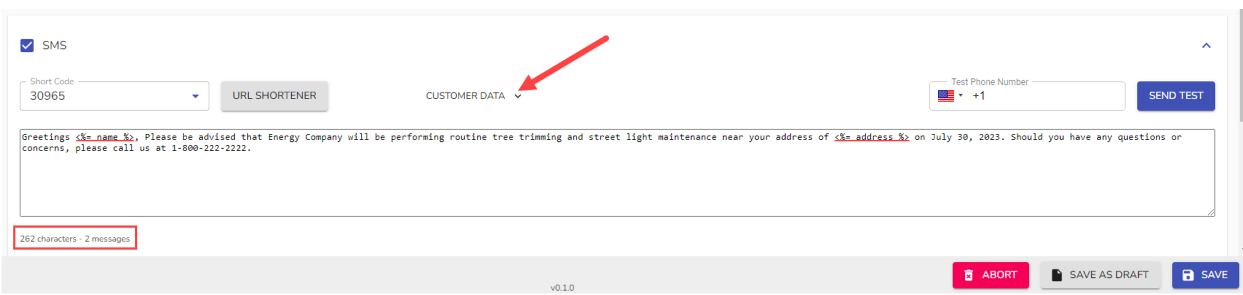
HOW TO BUILD SMS TEMPLATES IN EONS

Clicking on “New Template” will start the new template creation process. Enter an appropriate Template name, select the visibility level/permissions, select one or more Tags to categorize the template, and select the SMS channel.



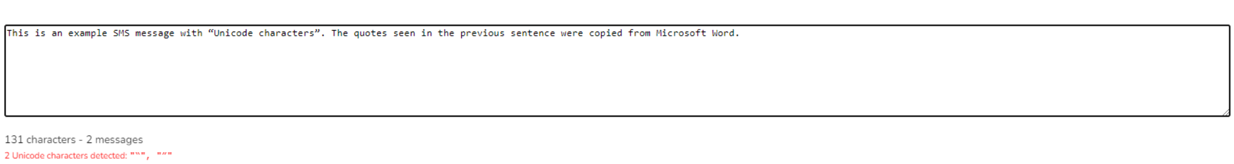
CREATING AND EDITING SMS TEMPLATES

After selecting SMS, select the short code and type or paste in the SMS body text. You may also insert variables into the script from the Customer Data drop down to personalize the message. This list of variables is based on your organization’s EONS configuration and set-up.



SMS messages have a maximum length of 160 characters, including spaces. Messages over 160 characters are split into multiple text messages. Smartphones typically concatenate a message to appear as one message, however, it is still considered more than one SMS message on the back end and from a billing perspective.

Unicode characters can increase the number of messages to be sent. These characters are most often encountered when copying and pasting the content of the SMS from Microsoft Word. Any Unicode characters detected in the message will be noted in red messaging displayed below the SMS input box.

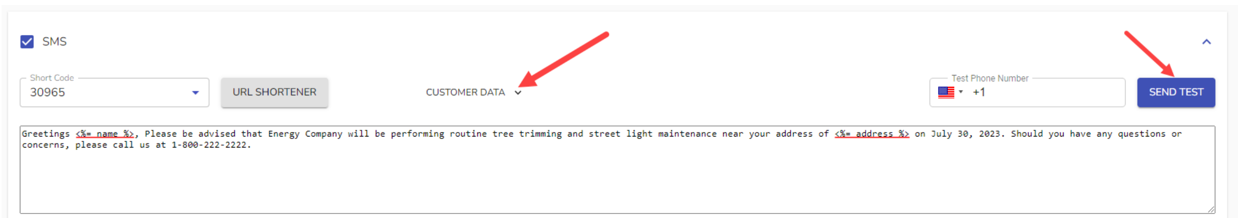


To reduce the number of characters in an SMS message which contains a URL or link, click the “URL SHORTENER” button after highlighting the URL you would like to shorten.

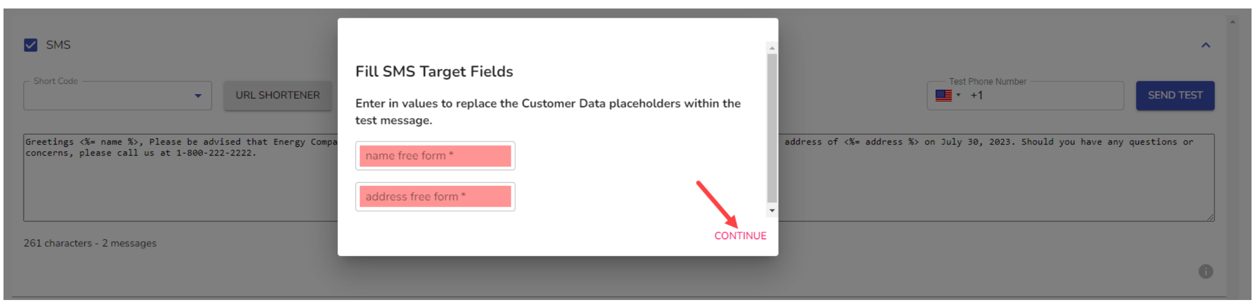
Users may edit and delete templates that have not been used in a campaign. When a template is edited, you must click the “Update” button to save any changes. If edits are not saved, the changes will not take effect during a campaign launch. Once the templates are successfully updated or deleted, a pop up will confirm the action.

SMS TESTING

Users can input a test number and send a test SMS to the number to verify the content.

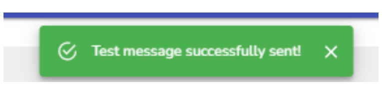


Variables may be replaced with custom text for test messages via Fill SMS Target Fields. Enter the custom text to replace the variables and click “Continue” to send the test message. To preserve the customer data field names, leave the fields blank and click “Continue.”



Note: If the same variable is used more than once in a message, only one value for the variable may be defined.

After clicking “Continue,” a pop up will confirm the test SMS has been sent.



EMAIL TEMPLATES

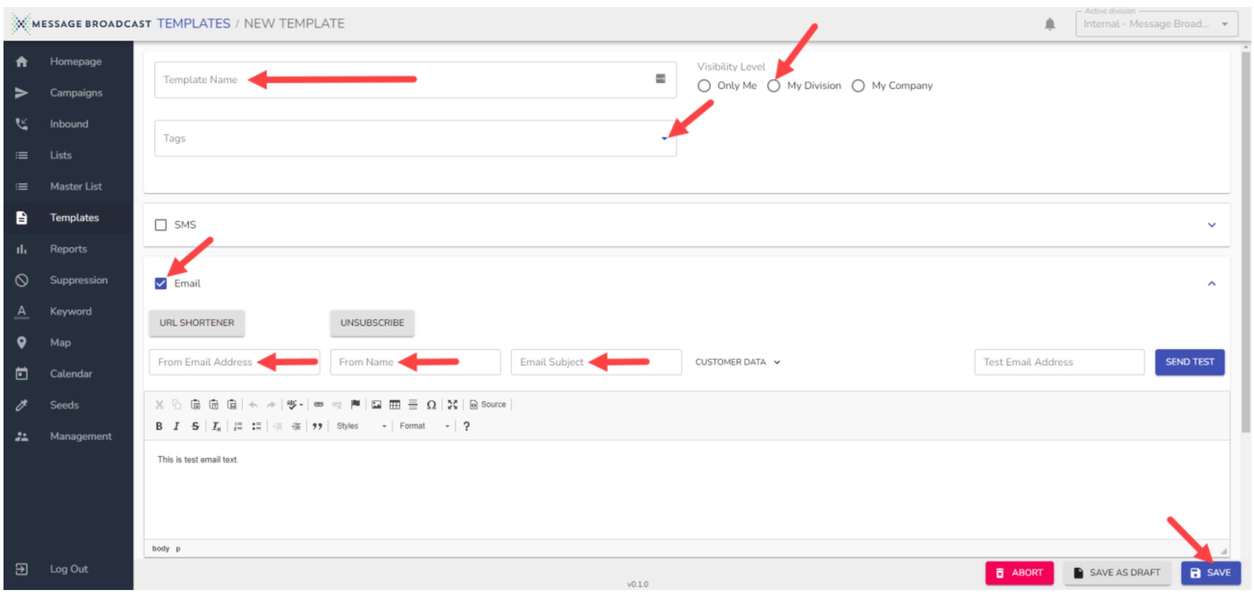
HOW TO BUILD EMAIL TEMPLATES IN EONS

Clicking on “New Template” will start the new template creation process. Enter an appropriate name, select the visibility level/permissions, select one or more Tags to categorize the template, and select the Email channel.

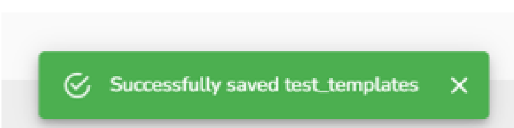
For email, provide the From Address, From Name (a user-friendly name of your choice for the ‘From’ name that appears on the email notification), Email Subject and email body text.

Note: A custom default From Name, which will be used on all email templates, may be specified upon request. Please reach out to your account manager, or submit a help desk ticket, for more information.

Next, click on “Save” to save the template.



A success message pop up will then appear.



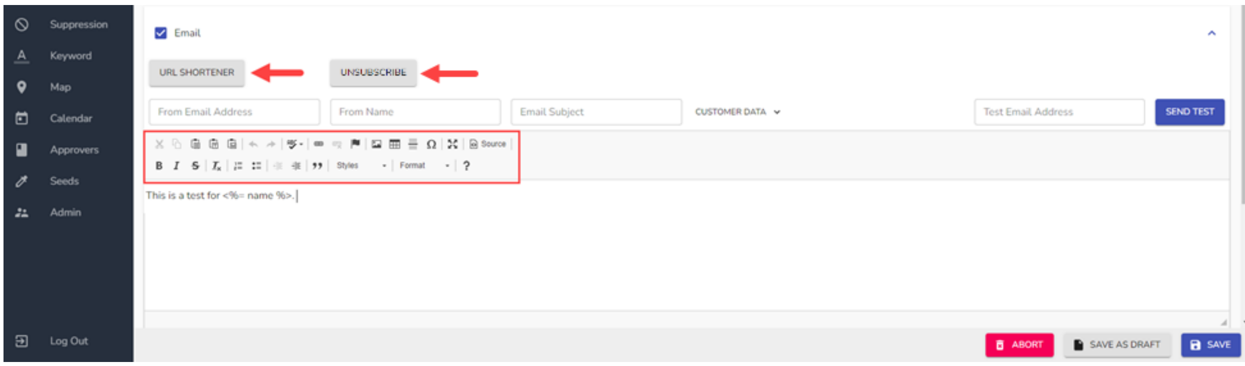
CREATING AND EDITING EMAIL TEMPLATES

Editing email templates is managed through a WYSIWYG HTML editor. This editor allows for the creation of email templates through a visual editor. Create email content by typing or pasting HTML code into the source editor and preview it.

ADVANCED FUNCTIONALITY

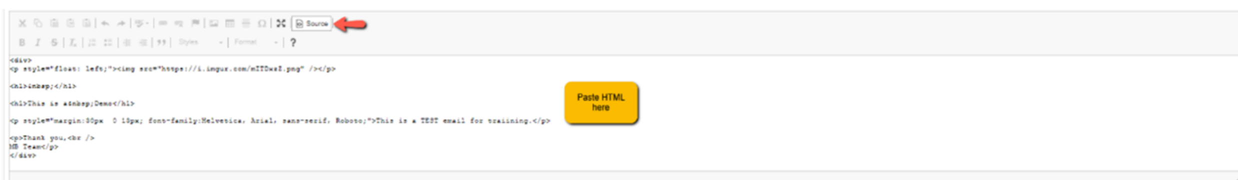
URL Shortener – When sending an email, you can select the “URL Shortener” button after highlighting the URL you would like to shorten.

Unsubscribe – When sending an email, you can select the “Unsubscribe” button to insert a link to your Unsubscribe page within the body of the email. *Note:* This is only available if you have an Unsubscribe page configured within EONS.

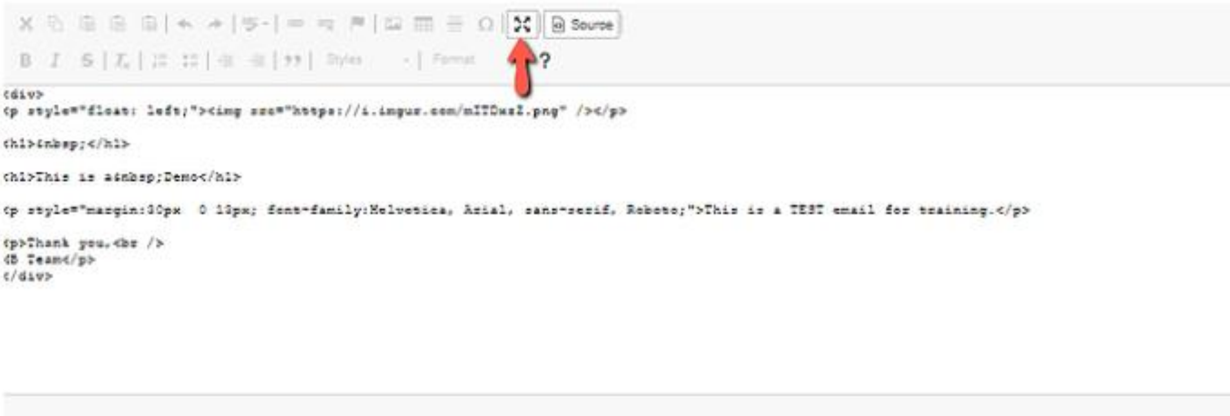


HTML body

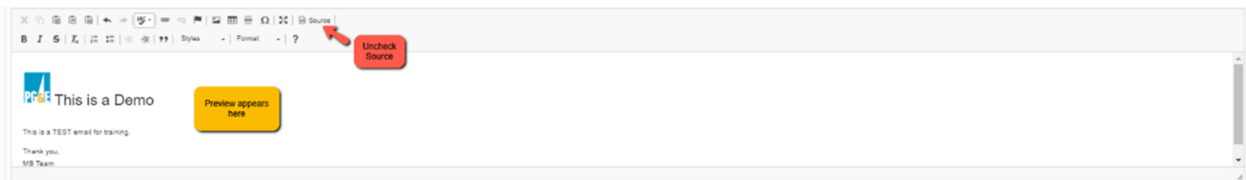
Select the code view option by clicking "Source" from the HTML editor. Create email content by typing or pasting HTML into the body of editor. The email body can be edited by simply typing it in.



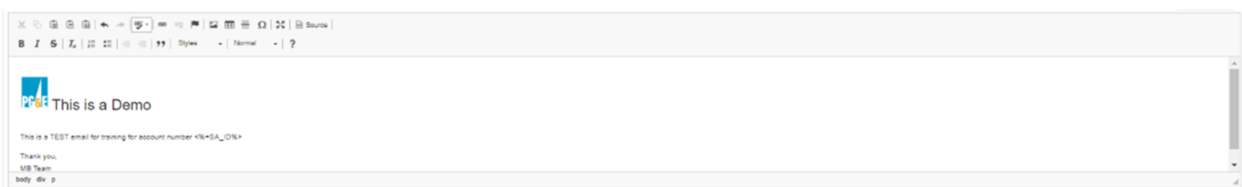
You can edit the email content in full screen mode by clicking on the full screen option as shown below. Simply click again to escape the full screen mode.

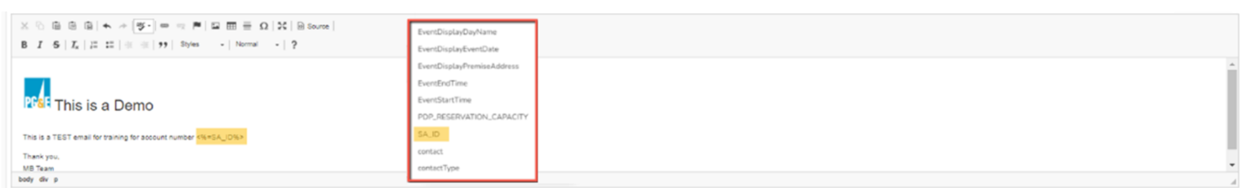


Once you uncheck the code preview by clicking “Source” again, the email preview appears on the body of the editor. You can edit the HTML body directly from the preview.

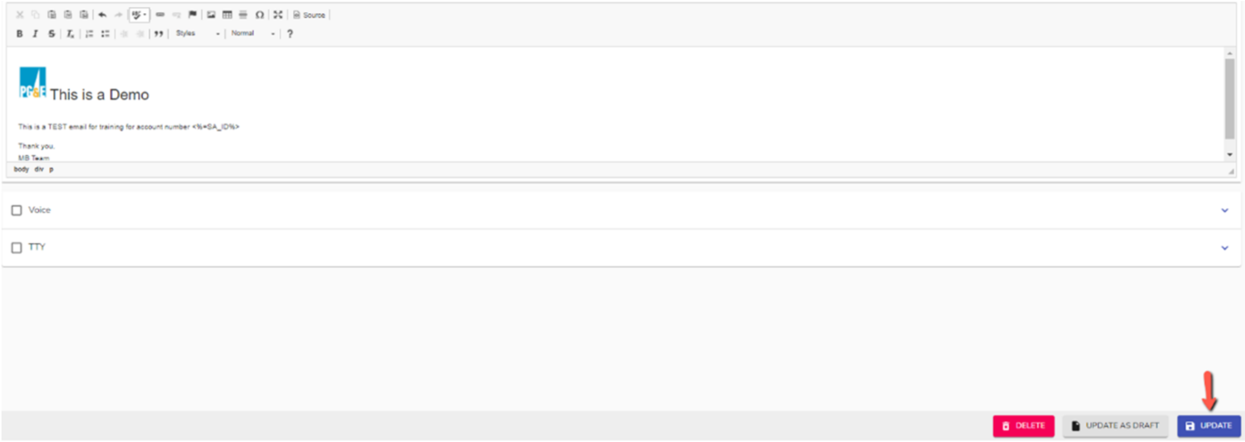


During email template creation, users have the option to insert variables into the script from the list via the Customer Data drop down list.



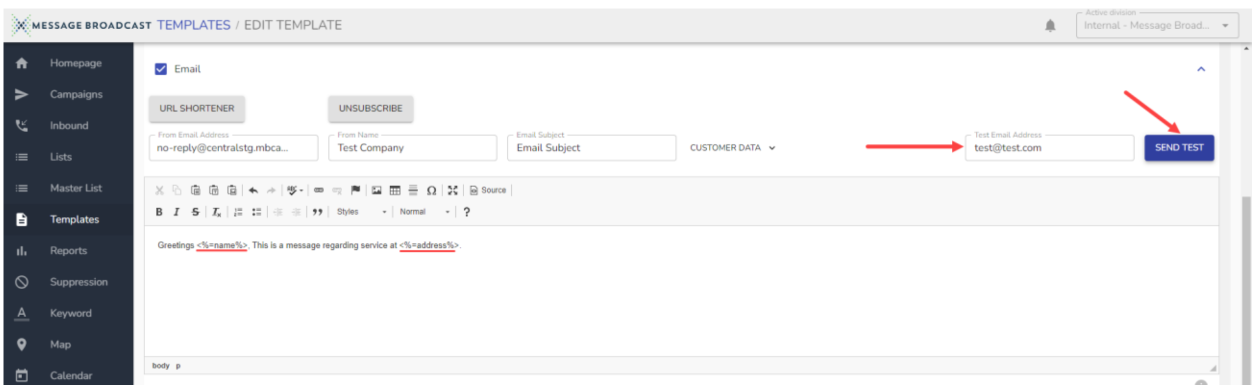


At any time, users can update, edit, and delete Templates. Once a Template is edited, users must re-publish the template by clicking the “Update” button to update the content. If edits are not updated, these changes will not take effect during a campaign launch. Once the templates are successfully updated/deleted, a pop up appears confirming the action.

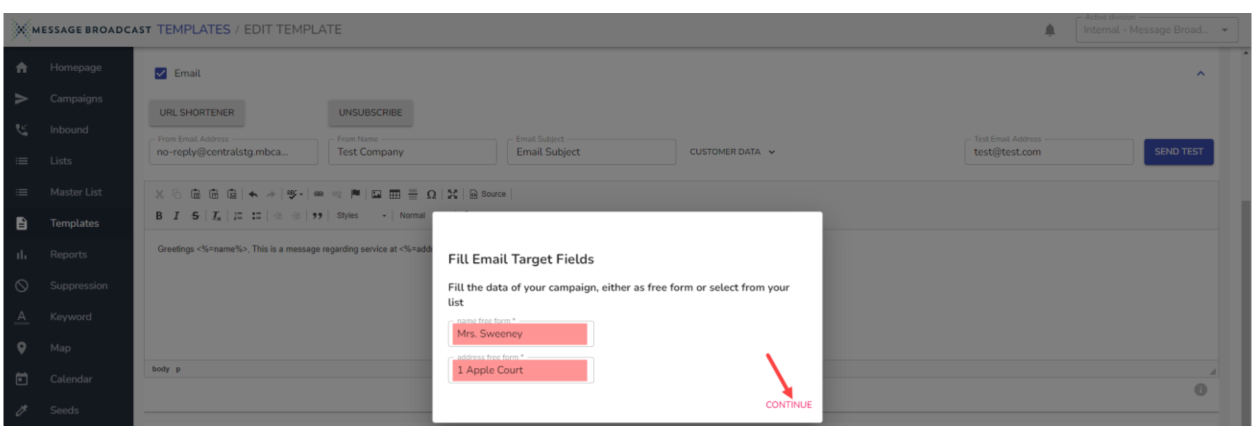


EMAIL TESTING

Once the template is set up and ready for testing content, enter the test address and click “Send.”

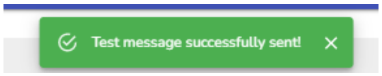


Variables may be replaced with custom text for test messages via Fill Email Target Fields. Enter the custom text to replace the variables and click “Continue” to send the test message. To preserve the customer data field names, leave the fields blank and click “Continue.”



Note: If the same variable is used more than once in a message, only one value for the variable may be defined.

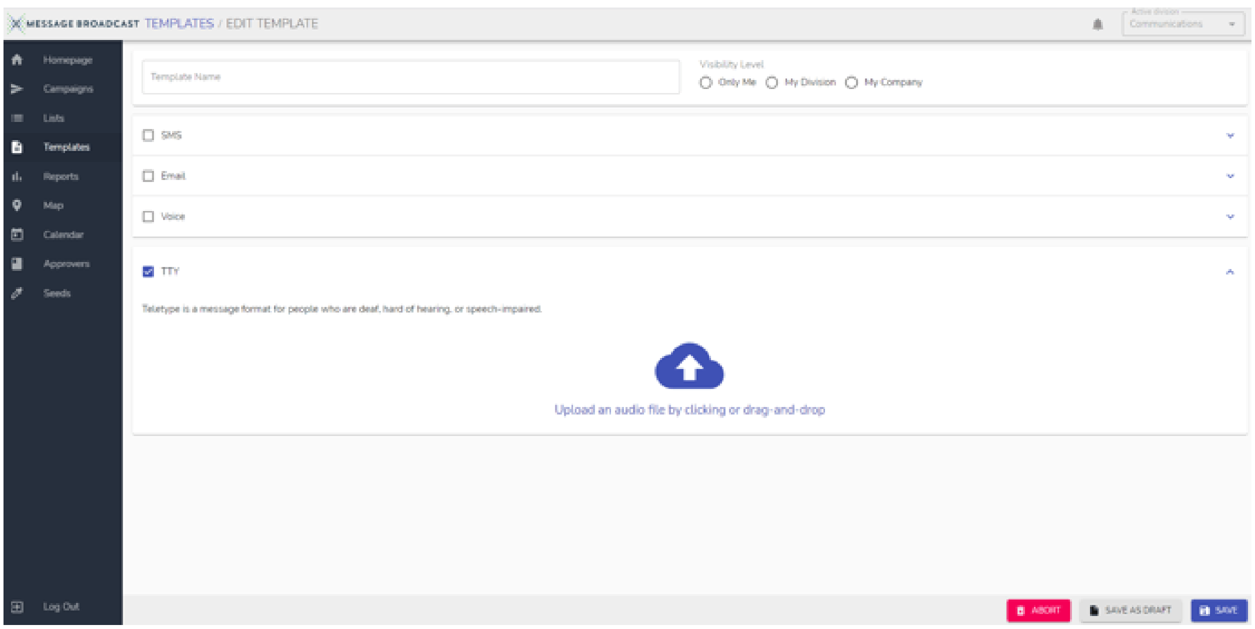
After clicking "Continue," a pop up will confirm the test email has been sent.



TTY TEMPLATES

TTY MESSAGING

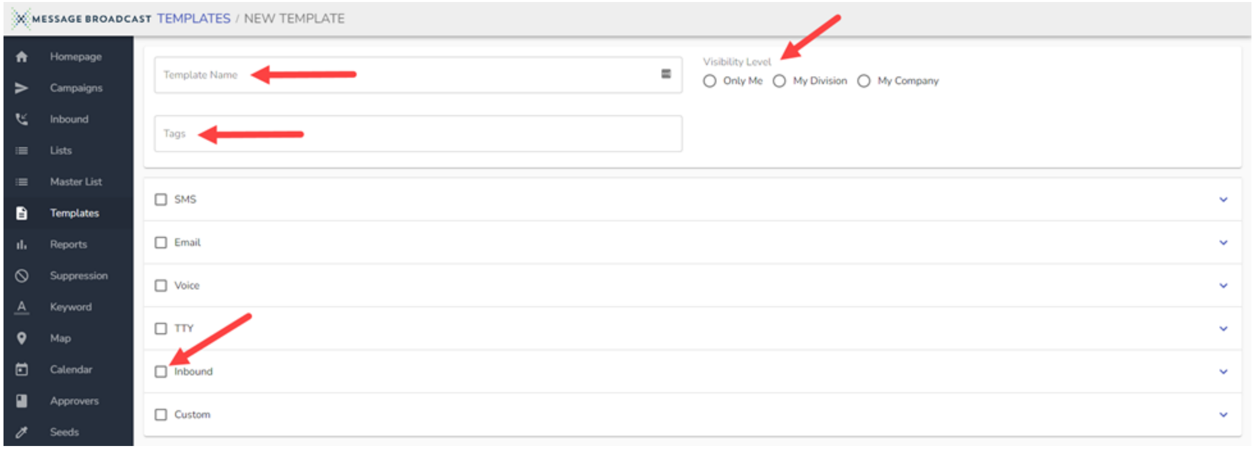
Teletype (TTY) is a messaging format for people that are deaf, hard of hearing, or speech impaired. Users can upload an audio file for TTY campaigns.



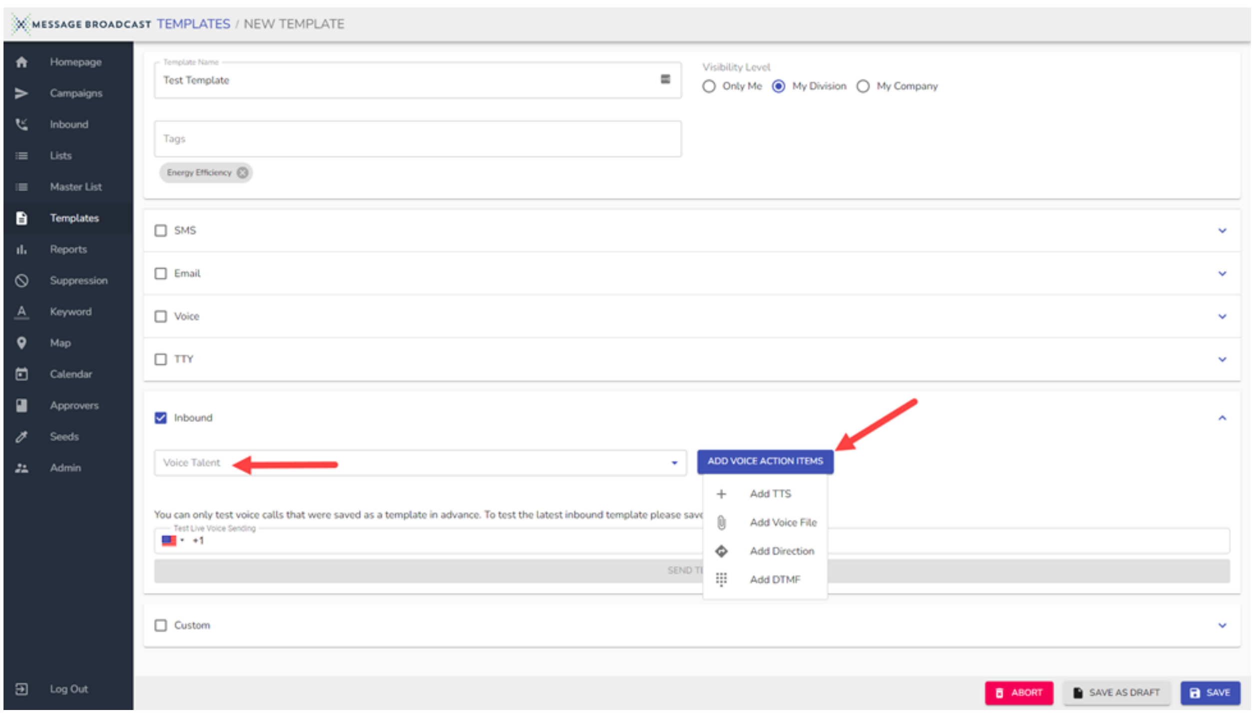
INBOUND TEMPLATES

HOW TO BUILD INBOUND TEMPLATES IN EONS

Click on the "New Template" button to create a new template. Enter an appropriate name, select the visibility level/permissions, select one or more Tags to categorize the template, and select the Inbound channel.



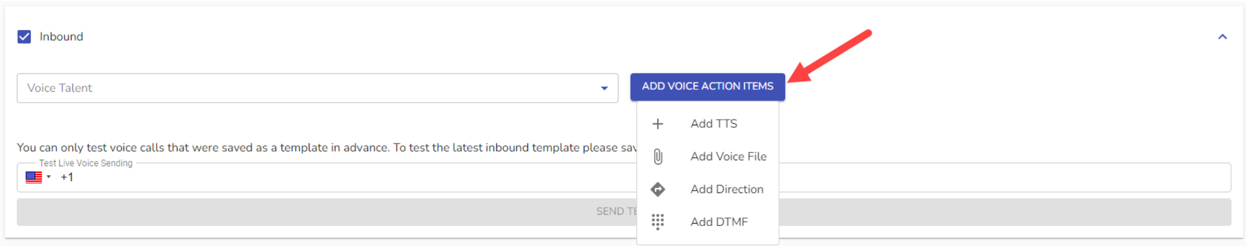
Once you have selected Inbound, the section will expand so you may select the voice talent and add the appropriate voice action items from the dropdown. Based on your preferred content, add a Voice File, TTS, Direction(s), and/or DTMF from the drop-down list.



Note: The audio file must be in .WAV, .mp3 or .ogg file format ONLY.

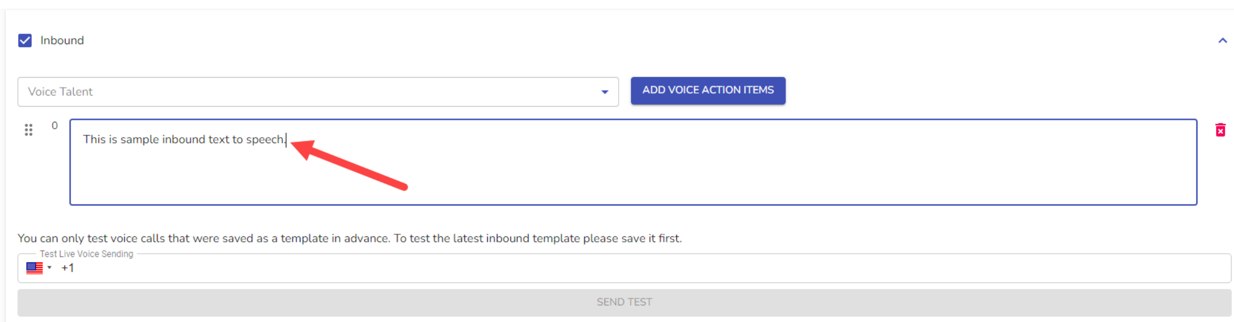
Add Voice Action Items

Build the inbound flow by selecting one of the available action items.



Add TTS

This action allows users to type or copy-paste your script into a content box for simple inbound template creation.



You can delete the TTS element by clicking on the “Delete” (trash can) icon.

Add Voice File

This action prompts users to add an audio file by either clicking on the up arrow or by dragging and dropping a file into the space. Once uploaded successfully, you will see the uploaded file.

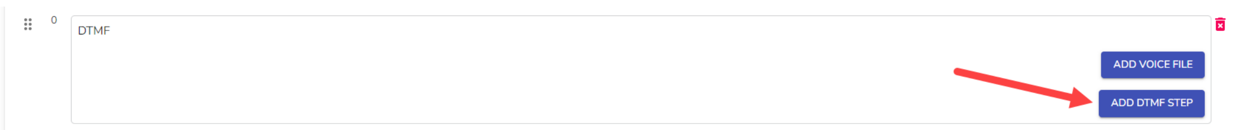
Replace the file by clicking the up arrow or delete the uploaded wav file by clicking on the “Delete” (trash can) icon.

Add Direction

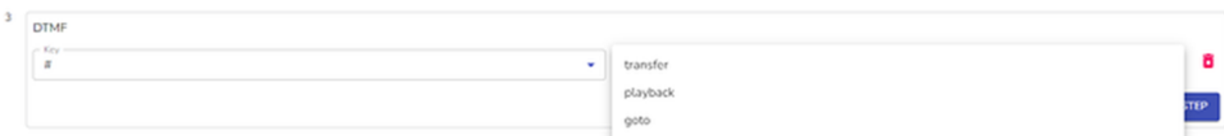
Adding directions enables users to create a flow within the inbound template by directing them towards the next step. You may select the next step in the flow by selecting the GO TO option.

Add DTMF

Adding DTMF enables users to introduce key press options within the Template. Clicking on the “ADD DTMF STEP” button selects the "key" and the respective action that the Keypress must perform.



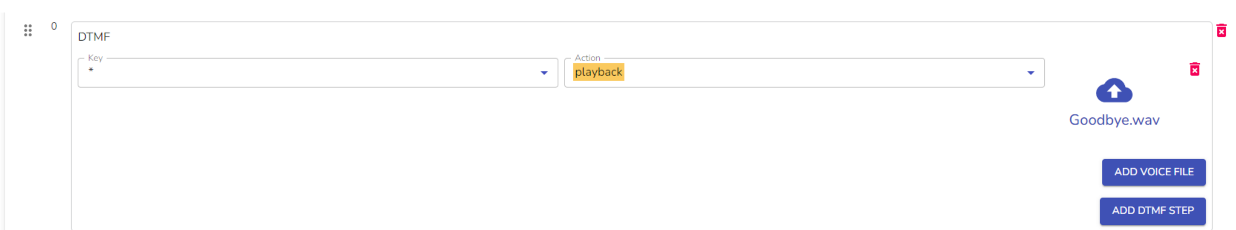
Once the key is assigned to perform a certain action, it is no longer available in the drop-down menu. DTMF can perform 3 actions: transfer, playback and goto:



Transfer allows transferring calls to a predetermined number such as CSR. Users must provide a Transfer number in the Phone input box. For example: Users may select Press # to transfer to the 1 (800) 800-8000 number as shown below.

Playback allows users to play a different script on Keypress. Users must provide an appropriate .wav file to be played back to the end user/customer.

For example: When users can select the Press * option to end the call and play back a Goodbye message, as shown below.



Goto - This action allows you to skip the inbound flow to any other steps that were already laid out during the Inbound template creation process. You must select "go to Step" from the drop down.

For example: Keypress 9 takes you to Step "2" in the flow.

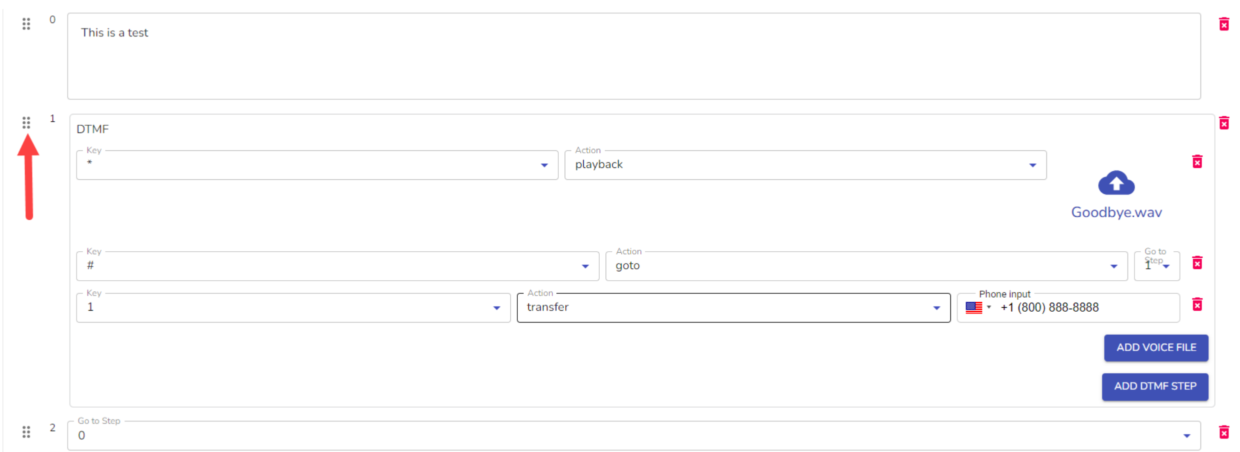
You may add as many DTMF options until all the Keypress options are exhausted in the drop-down menu.

Once set up, save the updates by clicking the “Save” or “Update” buttons as applicable during the process of template creation.

Note: You can only test inbound calls that were saved as a template in advance. To test the latest inbound template, save it first.

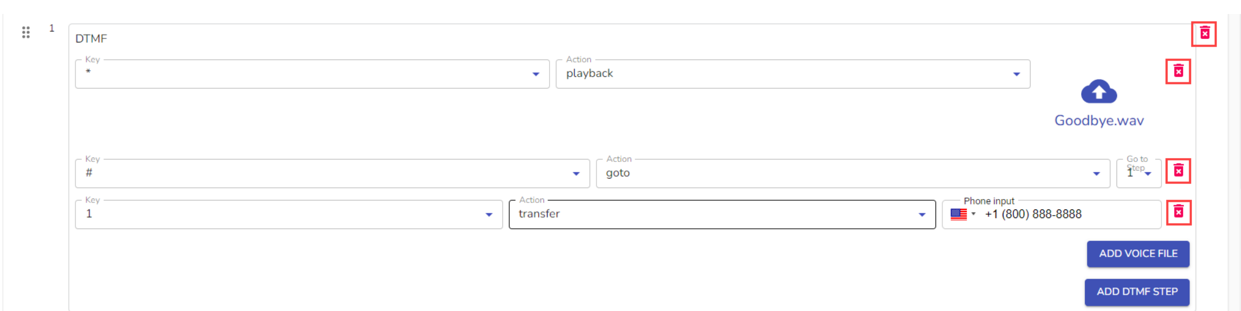
Move Steps

At any time, users can modify the inbound template flow by moving the steps around with the “Drag and Drop” (dots) icon on the left navigation menu. Click the “Drag and Drop” icon to move the steps as needed.



Delete Steps

During the process of inbound template creation, users can delete the above steps by clicking the “Delete” (trash can) icon as shown below.



REPORTS

Leverage the power of dashboard reporting and visual mapping for targeted communications using customer preference and location data.

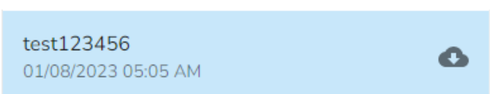
DASHBOARD STANDARD REPORTS

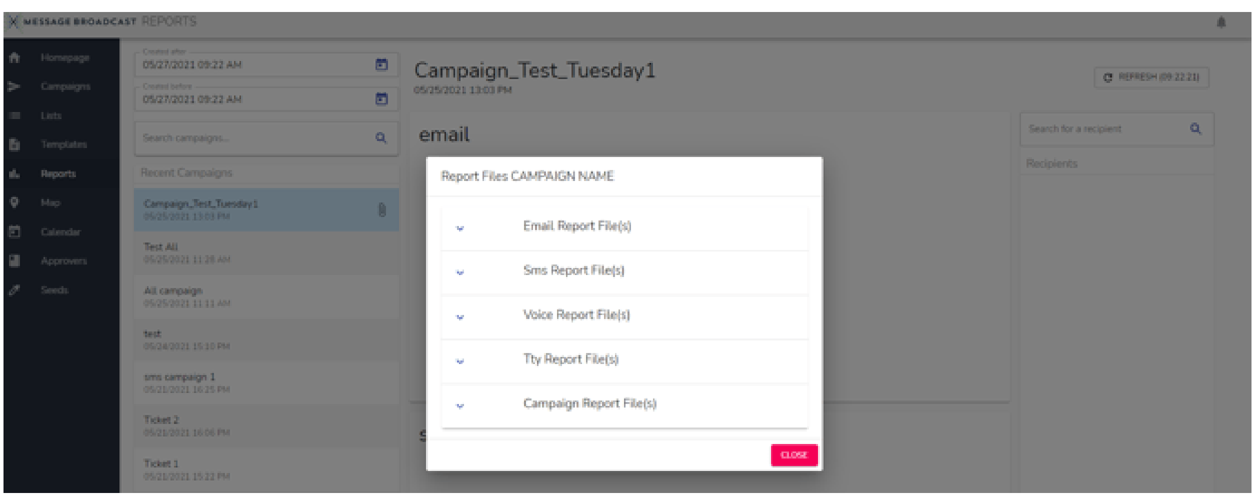
Analyze campaigns sent within the last 90 days and download detailed reporting metrics with EONS Reports.

REPORTING AND METRICS

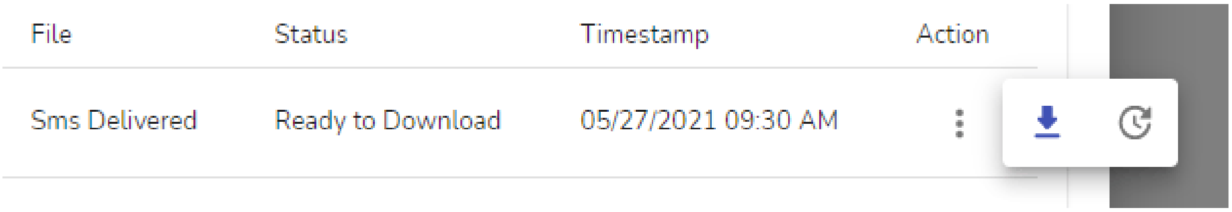
Users can analyze Reports by navigating to the Reports tab. First, enter parameters to find a campaign (created before/after).

View and download detailed results as files for each campaign by clicking the download icon in the Recent Campaigns section.



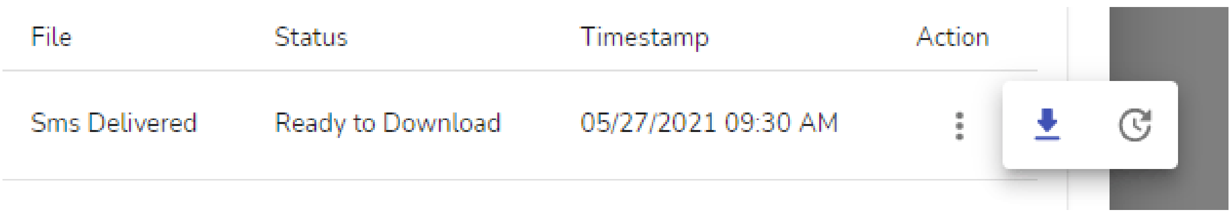


After selecting the desired Report File, choose a file for download by clicking on the three dots to generate the report.



Once generated, select the blue Download icon to download a comma-separated file (.csv).

Campaign data can also be refreshed by clicking on the refresh icon next to the download button.



The data from this file can be analyzed in Excel or any other csv-capable editor for insights into overall delivery stats or to find specific items such as which critical care customers did not receive a successful message delivery.

Note: When searching by phone number, ensure that you add "1" as the prefix.

DISPOSITION STATUS CODES

The following statuses may be accessed via disposition reports in EONS.

Status	Email	SMS	Voice	Type - Final	Description
processed	✓				Sent to carrier, but their delivery status is unknown. Will be replaced by Unknown if carrier does not reply in 72 hours.
deferred	✓				Receiving server temporarily rejected the message and email cannot immediately be delivered. All deferred messages are retried up to 72 hours.
Dispatched		✓			Sent to carrier, but we were not provided further detail. Will be replaced by Unknown if carrier does not reply in 72 hours.
Queued		✓			Message is queued within system and will be dispatched according to the rate of the account.
delivered(Email)	✓				Delivered for Email is not final because they can later be Opened or link tracking may record a Click.
Delivered (SMS)		✓		✓	Delivered for SMS is a final status as SMS does not provide Open or link tracking data.
MACHINE			✓	✓	Delivered to an answering machine.
PERSON			✓	✓	Delivered to a live recipient.
PROCESSED			✓		Call handed off to Provider but status has not been received.
REDIALING			✓		Call is being redialed due to Business Rules/Logic or due to previous failed call.
open	✓				Delivered. The recipient has opened the HTML message.
click	✓			✓	Delivered. The recipient clicked a link in the email.
dropped	✓			✓	One or more of the following reasons:
					Spam content found
					Previously unsubscribed, bounced or spam reported address
spamreport	✓			✓	The recipient has marked the message as spam and should never send another email
Unknown		✓	✓		SMS- Message was delivered to provider but no confirmation has been received or a confirmation that couldn't be interpreted was received.
					Voice- The call cannot be completed for any number of reasons such as network errors, local congestion, disconnect etc.
Unsubscribed	✓			✓	Recipient has in the past used the Unsubscribe link in an appropriate email.
bounce	✓			✓	Not delivered. Receiving server could not or would not accept the message. A most common reason for a bounce is that the recipient has previously unsubscribed from your emails or invalid mailbox.
Aborted		✓		✓	Not delivered.
Rejected		✓		✓	Message was rejected by the provider.
Expired		✓			Not delivered. Message expired before delivery to the provider. This may happen if the expiration time for the message was very short.
Failed		✓	✓		Not delivered. Message failed to be delivered.
Deleted		✓		✓	Message has been deleted. This may happen if the destination is an invalid MSISDN or opted out subscriber.

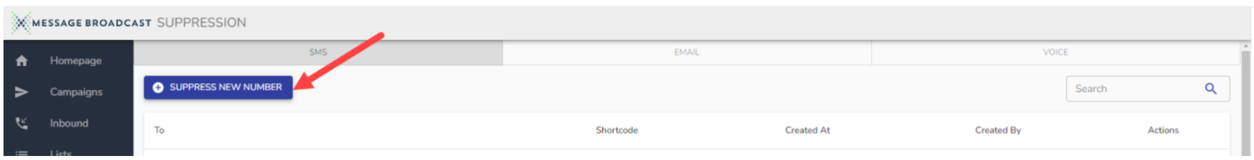
SUPPRESSION

MANAGE CUSTOMER OPT-OUTS

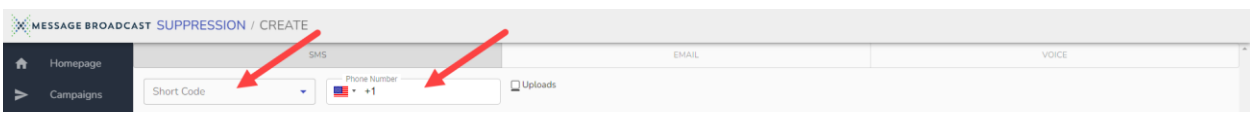
Suppression Lists allow users to manage their customer opt-outs. The contacts stored in the Suppression List can be managed directly under this section by either adding or deleting new contacts.

ADDING SUPPRESSED NUMBERS OR EMAIL ADDRESSES

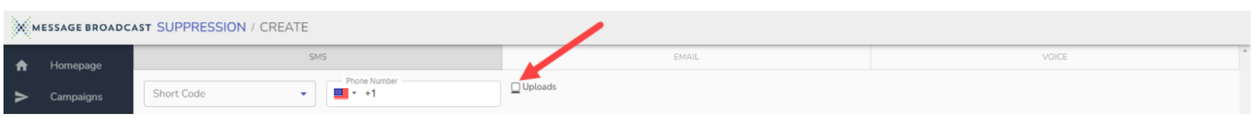
To add an individual SMS number to the Suppression List, select "SMS" and then click on "Suppression New Number."

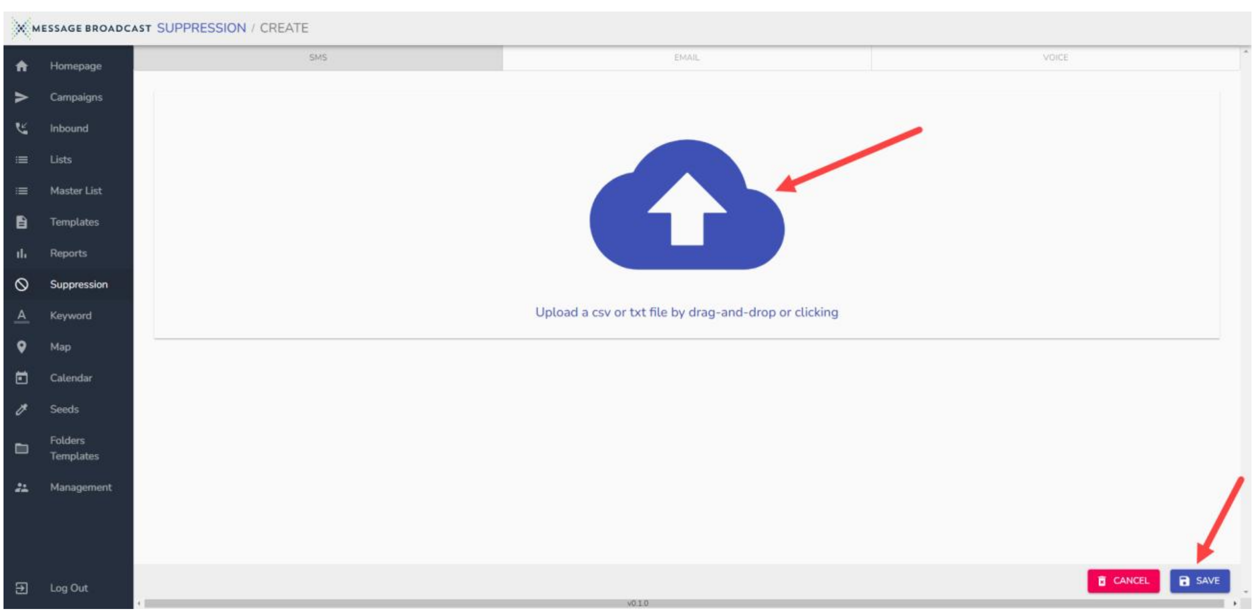


Next, provide the short code from which the SMS will be sent and the number to be suppressed, then click "Save."

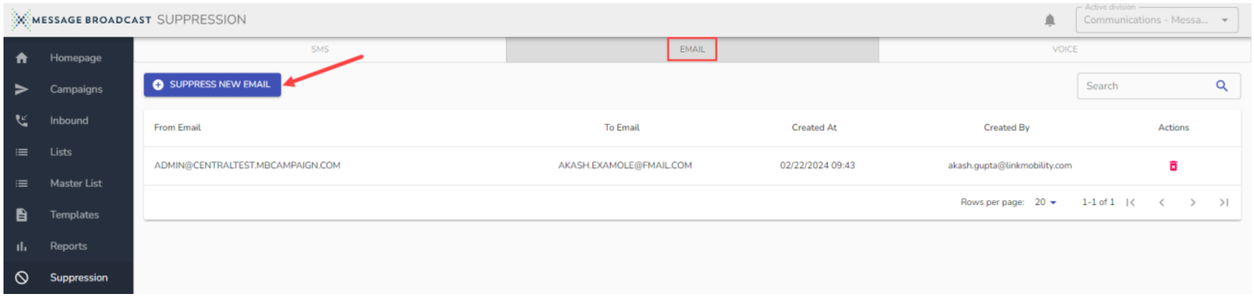


To upload a list of suppressed SMS numbers, click the "Uploads" checkbox, select the CSV file to be imported, and click Save.

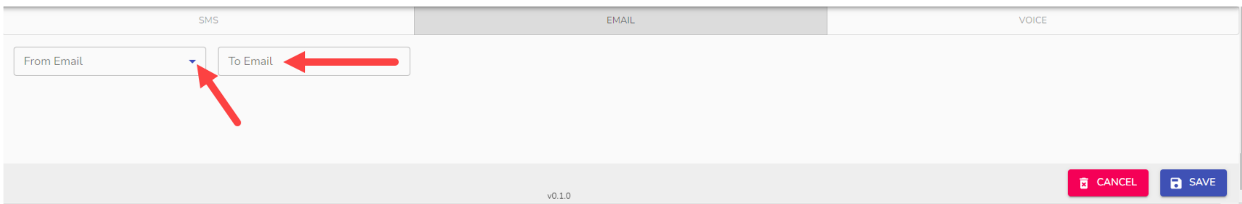




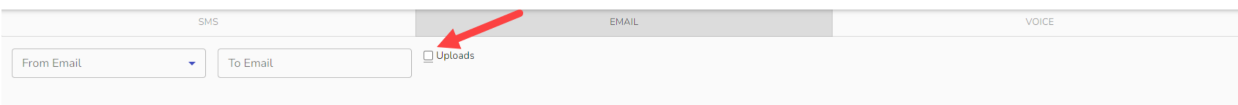
For Email suppression, select the EMAIL tab on top of the page and click on “Suppress New Email.”

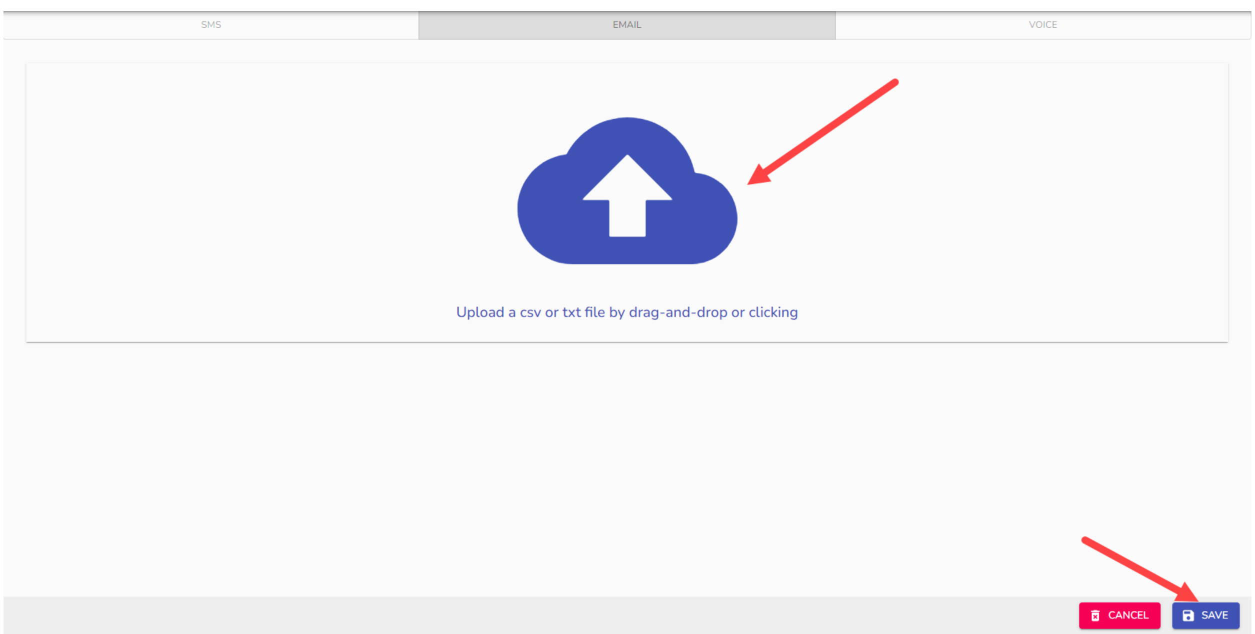


Next, provide the “From Email” and “To Email” addresses and click “Save.”

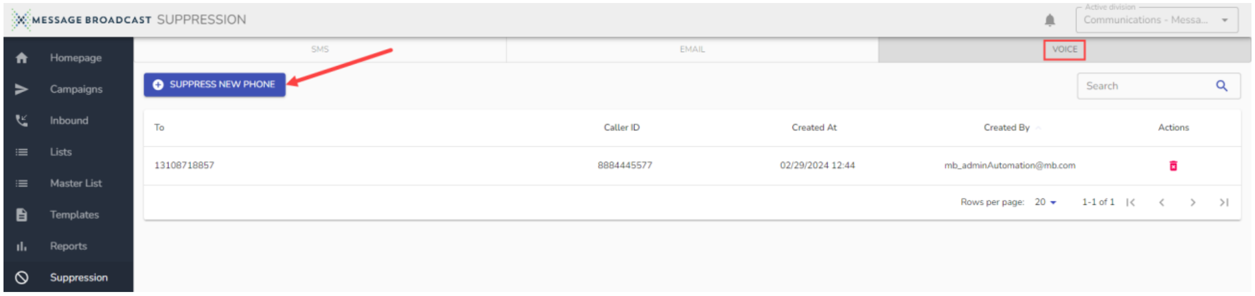


To upload a list of suppressed emails, click the “Uploads” checkbox, select the CSV file to be imported, and click Save.

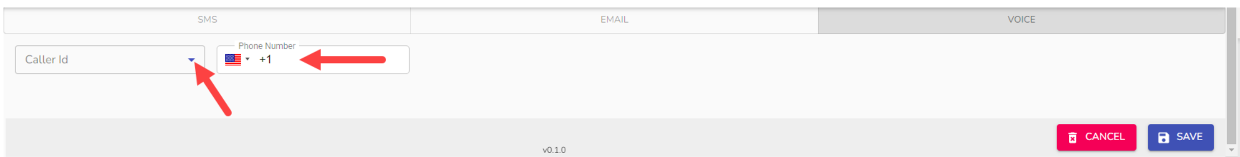




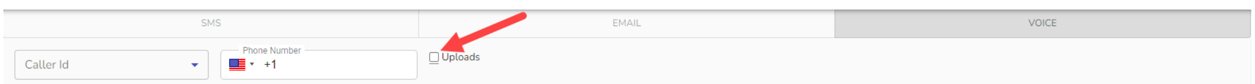
For Voice suppression, select the Voice tab on top of the page and click on “Suppress New Phone.”

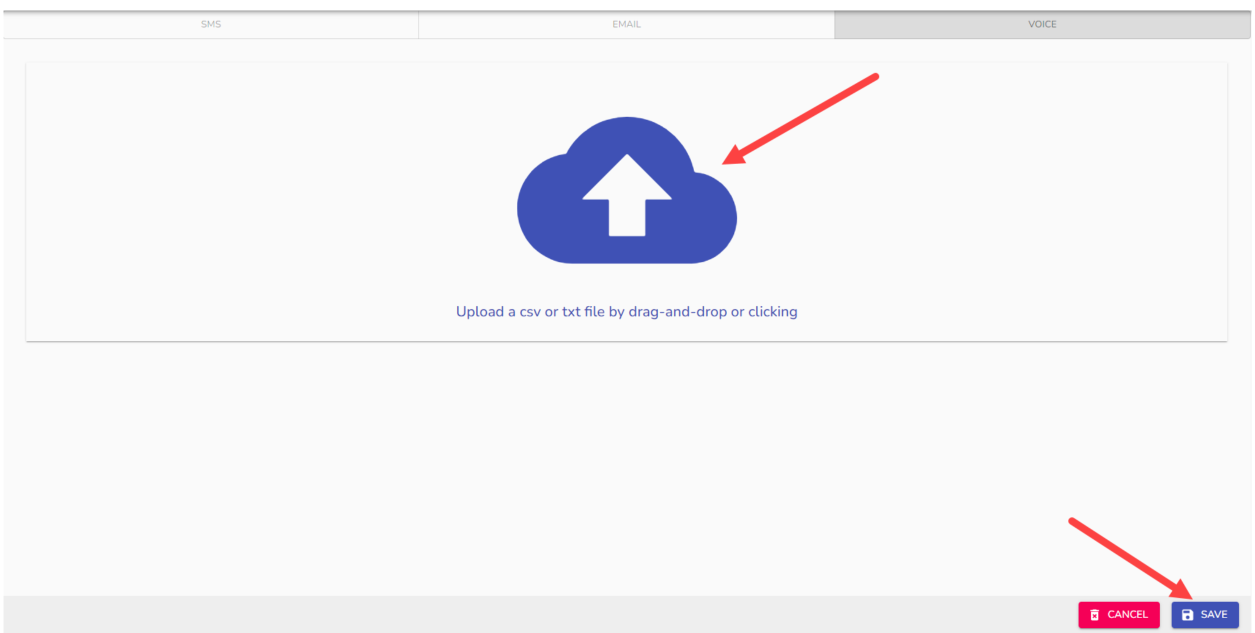


Next, select the caller ID for which the voice contact needs to be suppressed, the phone number and click “Save.”



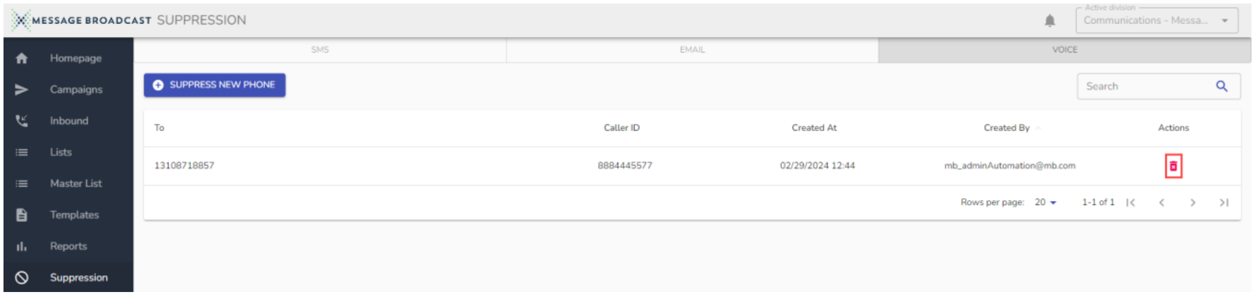
To upload a list of suppressed phone numbers, click the “Uploads” checkbox, select the CSV file to be imported, and click Save.



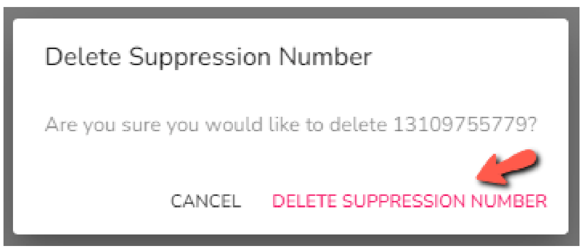


DELETE A SUPPRESSED NUMBER OR EMAIL ADDRESS

Users can delete a number or email address from the Suppression List by clicking on the "Delete" (trash can) icon under "Actions."



Once selected, a confirmation box pops up. Click on "Delete Suppression Number" to permanently remove the number from Suppression List.



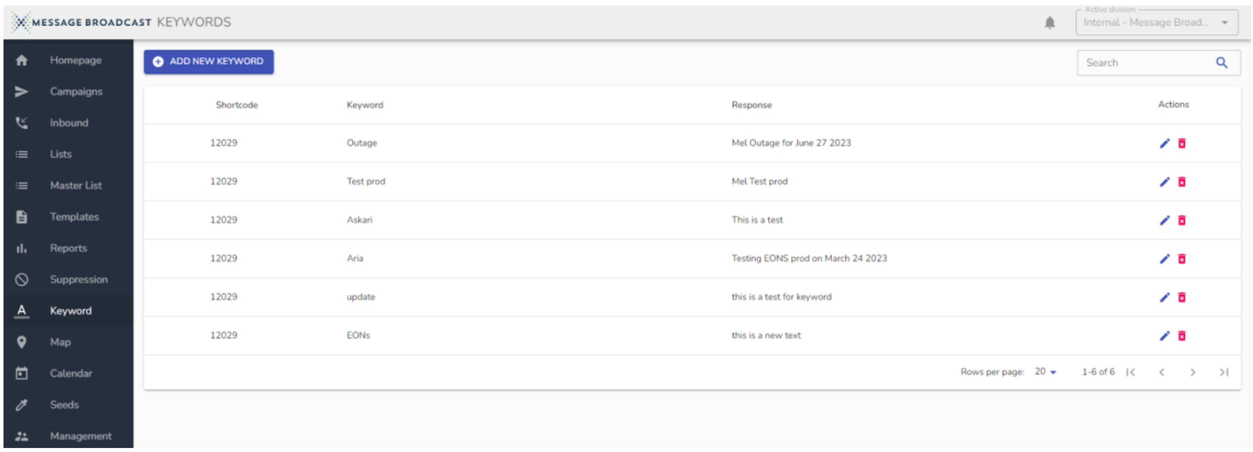
If you want to bypass suppression at campaign level, please refer to New Campaign.

KEYWORD

Access to Keywords depends on your organization's configuration.

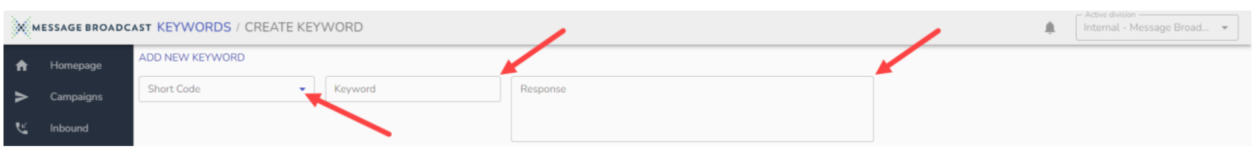
KEYWORDS FOR SMS RESPONSES

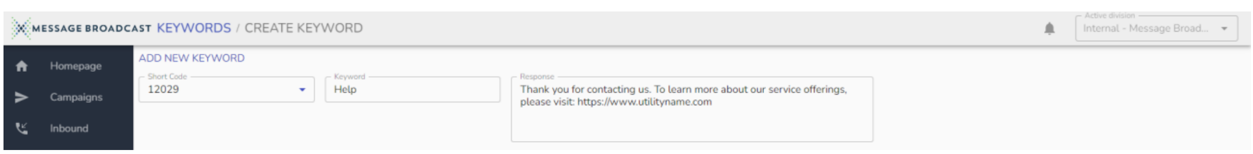
An automated response may be sent to a customer when a keyword is sent via SMS to a specified short code. The Keyword dashboard shows all keywords which have already been configured and allows editing or deleting through the two buttons under the "Actions" column.



ADD A NEW KEYWORD

A new keyword may be configured by selecting a short code from the drop down, entering the keyword for which a response should be provided, and then entering the response to send when that keyword is sent to the selected short code.

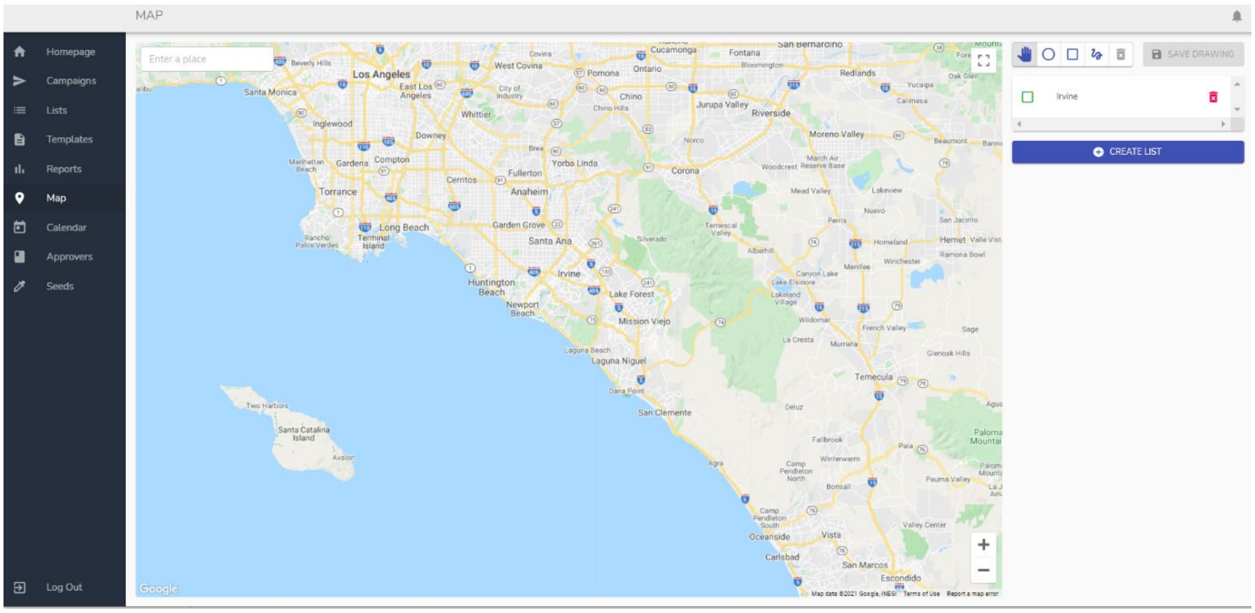




MAP

CREATE A CUSTOM LIST USING THE EONS MAP

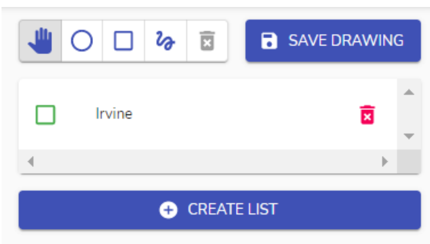
Targeted audience lists can be created directly from the EONS Map by selecting counties, cities or blocks and streets for custom communications such as outage, repair work or tree trimming notifications.



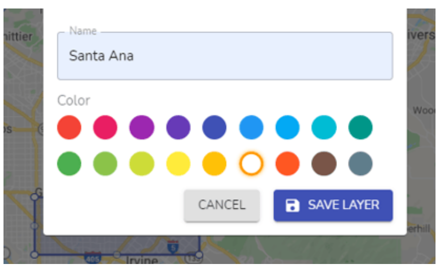
Using custom drawing tools, users can select specific areas, label them, and save them for Ad Hoc communications or later use.

To target a specific customer audience for communications, select a tool such as the circle, rectangle or free form drawing tool from the top right-hand tray and then highlight a region on the map.

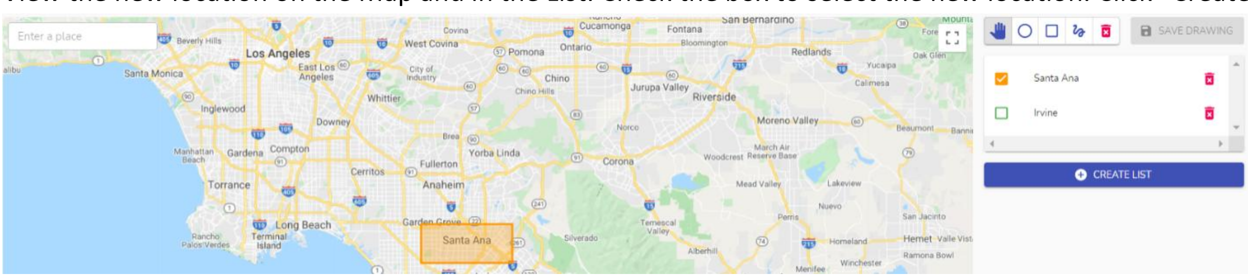
Next, click “Save Drawing.”



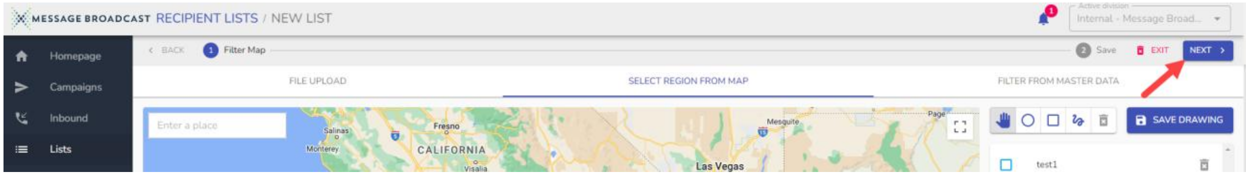
Name the drawing and select a color. Click “Save Layer.”



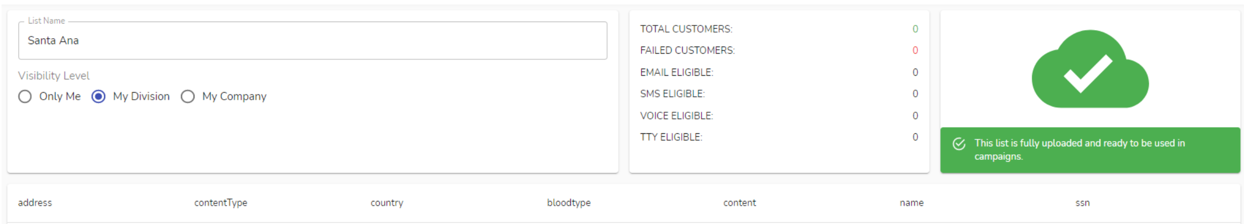
View the new location on the Map and in the List. Check the box to select the new location. Click “Create List.”



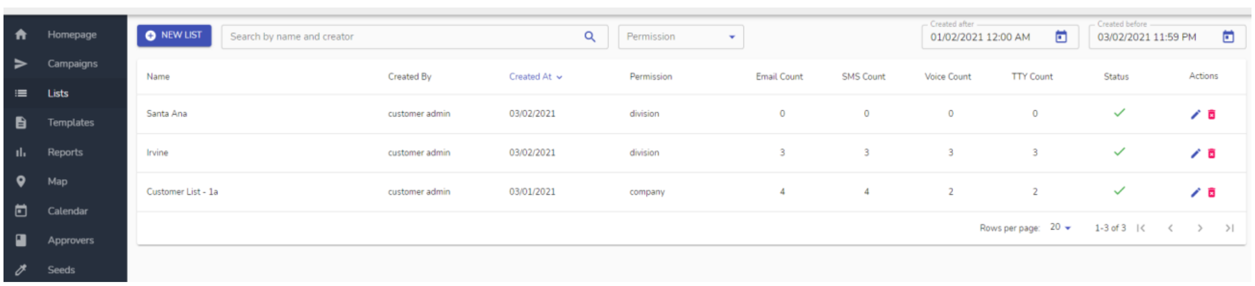
Click “Next” at the top right of the screen.



On the next page enter the List Name, select the Visibility Level, and click “Save” at the top of the page.



View the new List in the Lists tab.

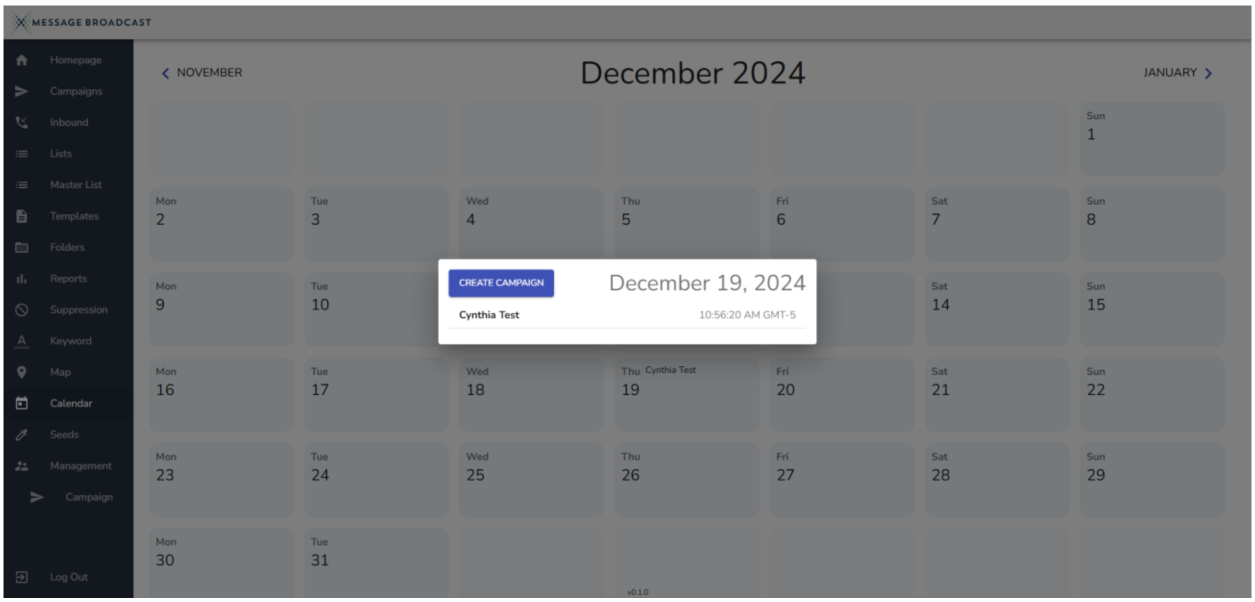


CALENDAR

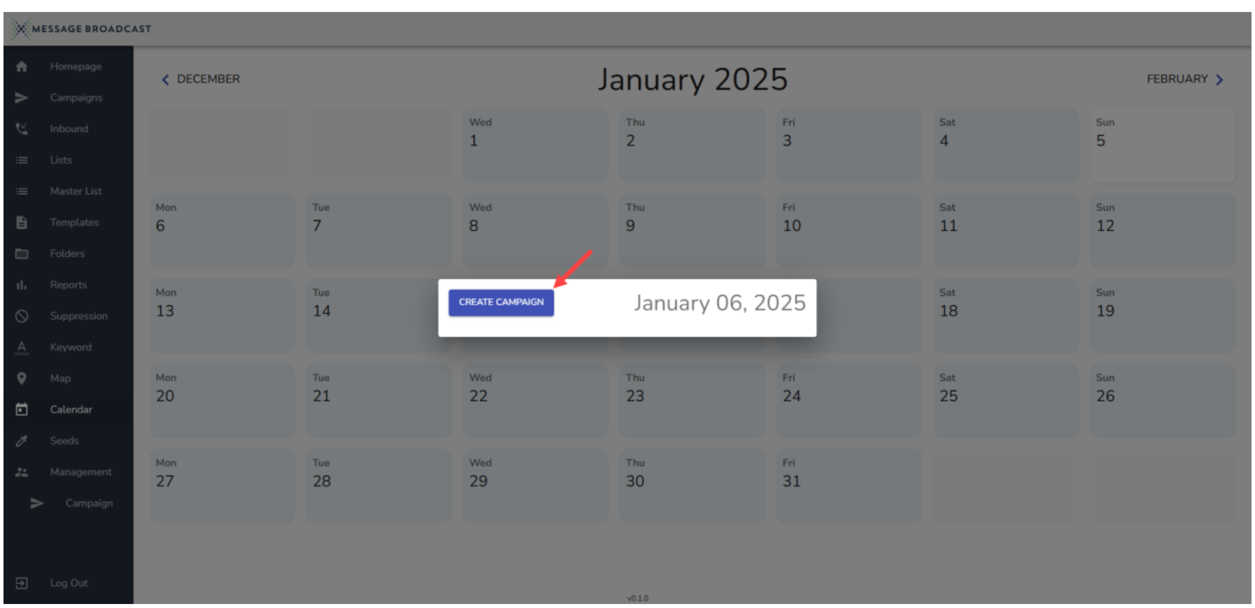
You can use the calendar functionality to plan when to launch campaigns.

CALENDAR-BASED CAMPAIGNS

Approved and sent campaigns are visible on the Calendar. Clicking on a specific date allows you to view details of the campaign.



You may also create a Campaign for a specific day directly from the Calendar. Simply select the desired day and click “Create Campaign.”

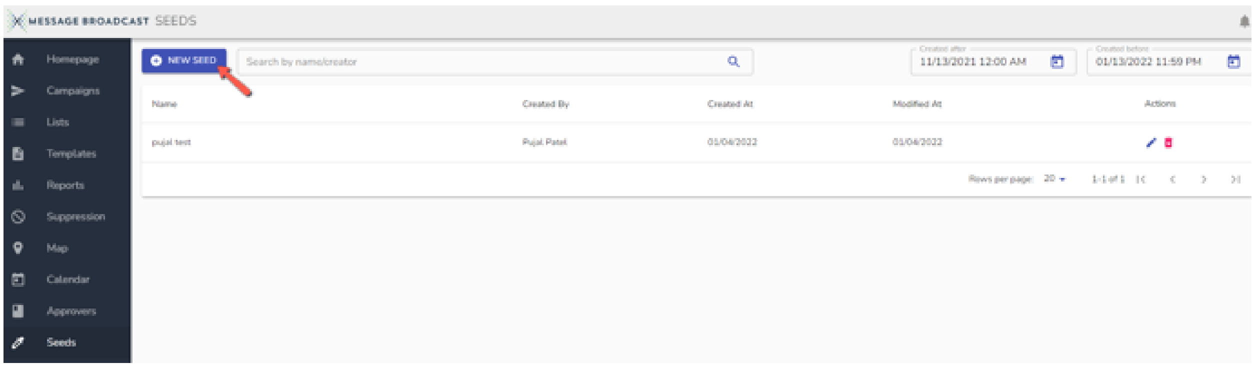


SEED LISTS

Seed lists let EONS users send test messages to pre-designated groups of recipients before launching a customer campaign.

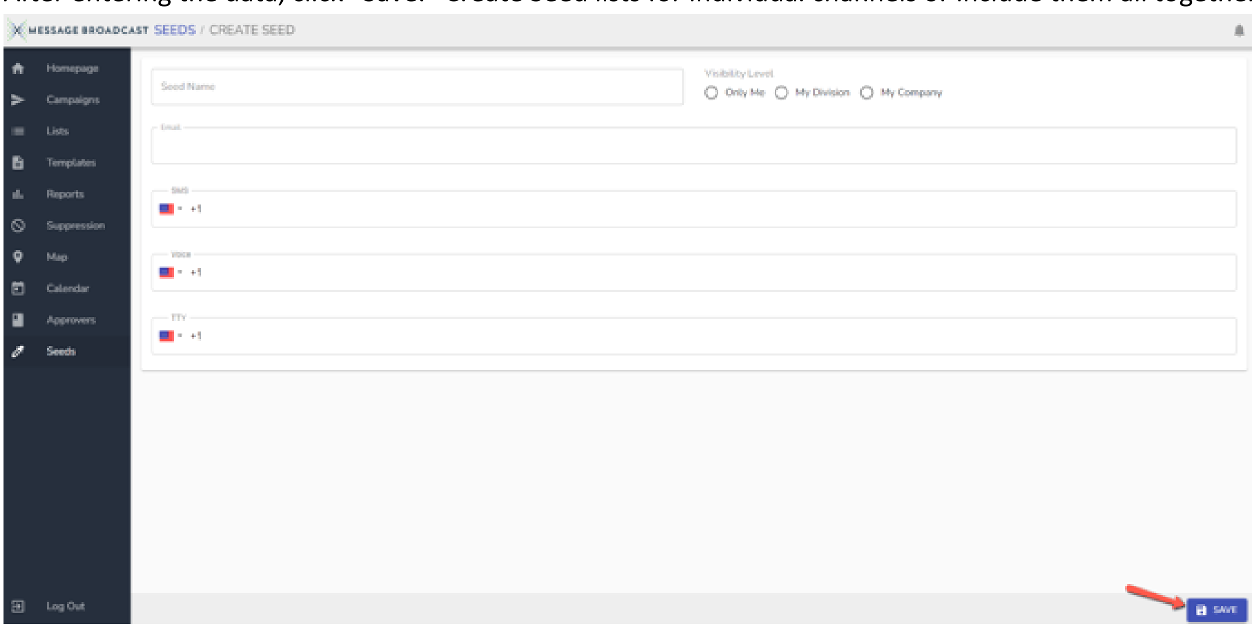
CREATING A SEED LIST

To create a new Seed, select the icon for Seeds on the left menu. Next, click the blue “New Seed” button on the top left of the Seeds dashboard.



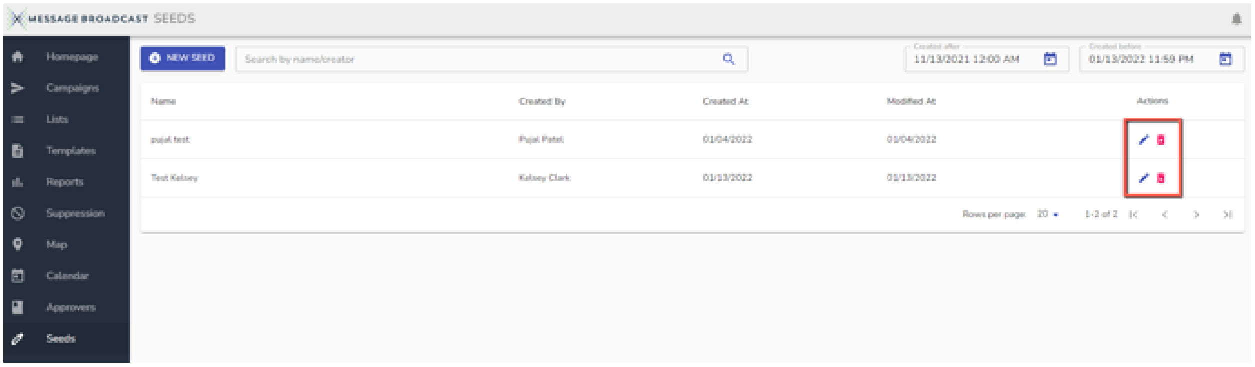
Be sure to save the Seed List with a recognizable name. It is required to enter seed data for at least one messaging channel.

When entering multiple numbers or emails, enter data separated by commas with no extra symbols or spaces. Add phone numbers as ten digits with no parentheses or hyphens. Users can also choose a Visibility Level by selecting "Only Me", "My Division" or "My Company" (based on your organization’s configuration). After entering the data, click “Save.” Create Seed lists for individual channels or include them all together.



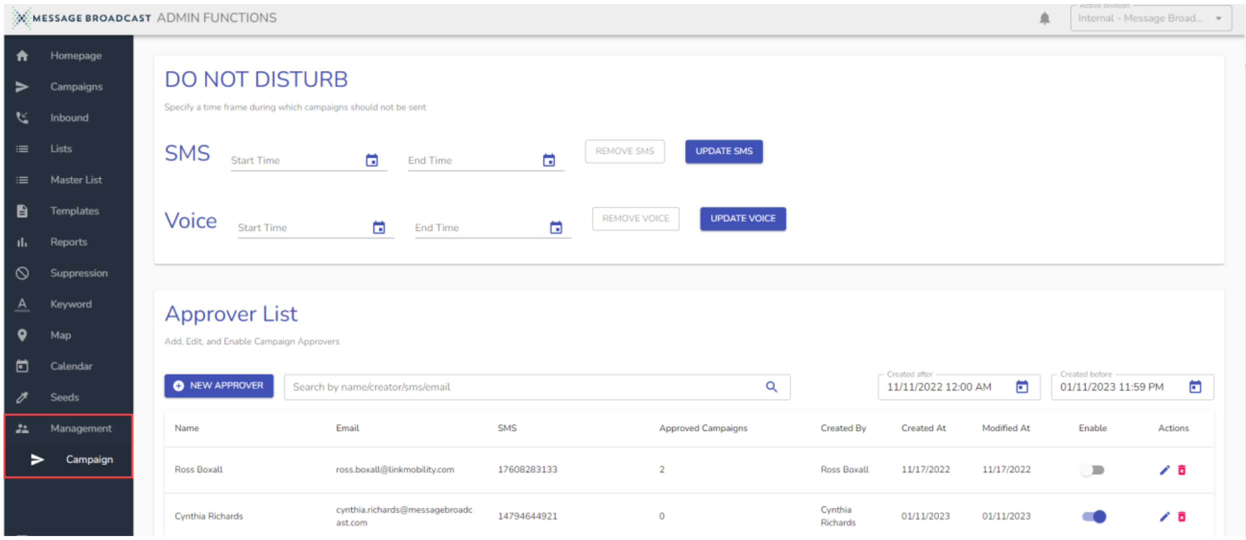
EDITING, DELETING, AND MANAGING SEED LISTS

After the Seed is created, a Seed List section will display a sortable and searchable table of all created seed lists and allow editing or deletion through the two buttons under the "Actions" column.



MANAGEMENT

Depending on your organization's set up, and your access level, you may see "Management" in the left panel menu. Upon selecting "Campaign" you will be able to create and manage Do Not Disturb settings and campaign Approvers.

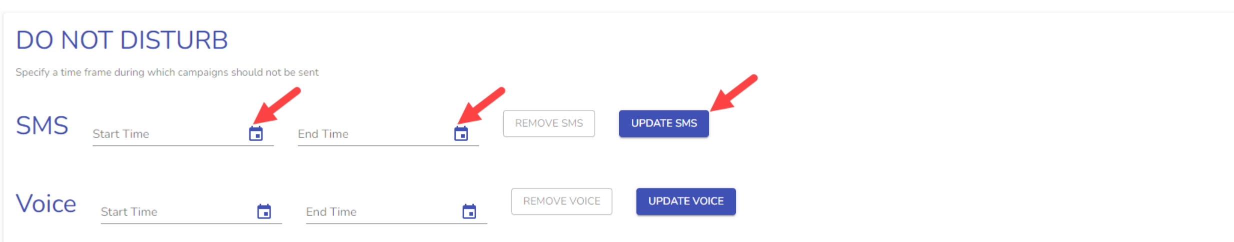


DO NOT DISTURB

Administrators may specify a time frame during which SMS and Voice campaigns should not be sent.

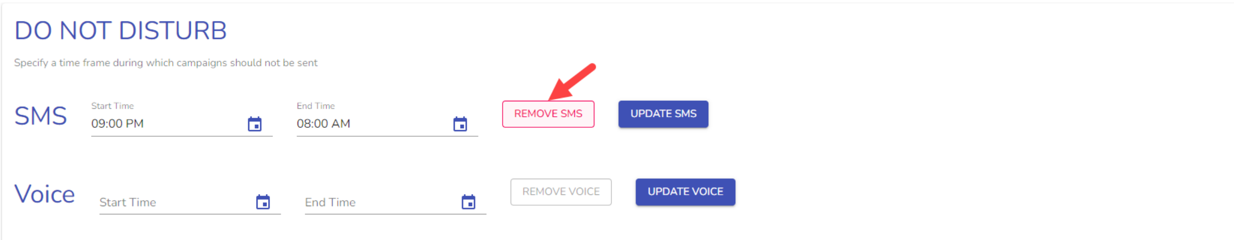
ADDING DO NOT DISTURB

To enable or update the time frame during which campaigns should not be sent, select the Start Time and End Time next to the appropriate channel and click the "Update" button.

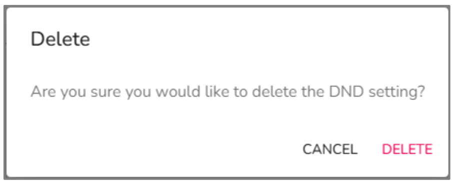


REMOVING DO NOT DISTURB

To remove and existing time frame during which campaigns should not be sent, click the appropriate "Remove" button.



Confirm the deletion by clicking "Delete" on the pop up.



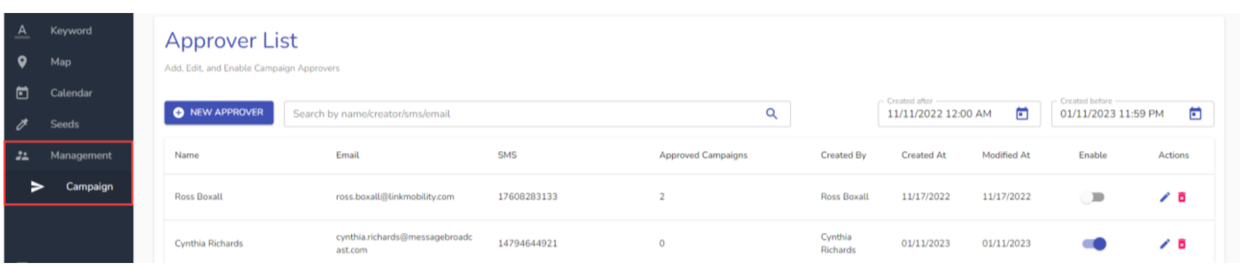
APPROVERS

CREATING AND MANAGING APPROVERS

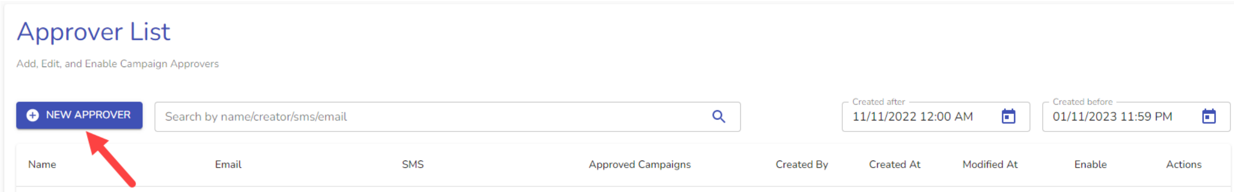
Access to the Approver List depends on your organization's configuration and may be available directly via "Approvers" on the left navigation, or via "Campaign" under the "Management" menu item.

Once a campaign has been created and is ready to deploy, there is a secondary layer of security. The organization can select an Approver that receives an email or SMS message with a PIN code allowing them to verify the campaign prior to launch. The organization can choose whom to add as an Approver for each campaign based on who is conducting communications.

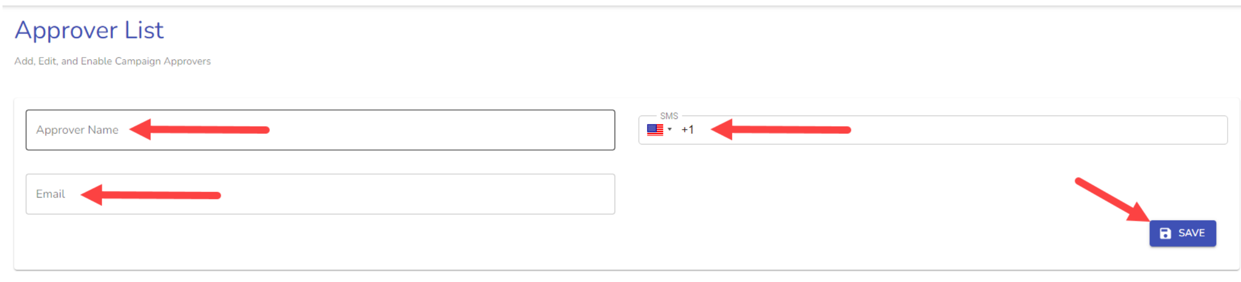
Note: Approvers do not need to be users in EONS.



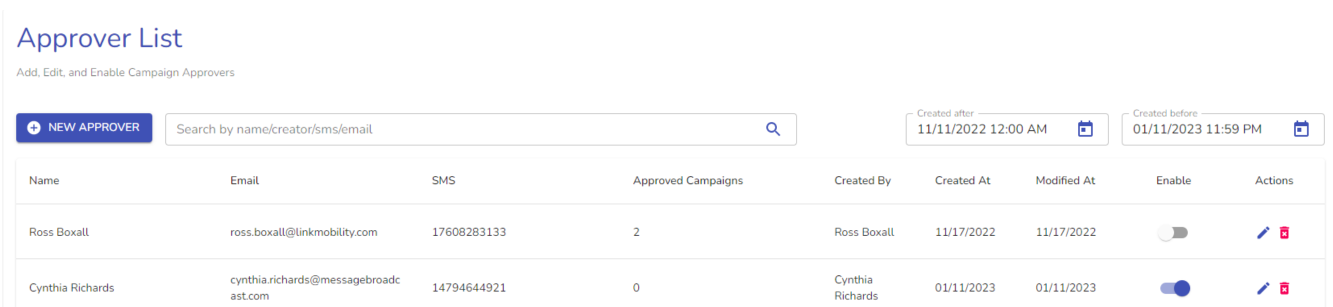
To add a new Approver, click the blue "New Approver" button in the top left corner of the section.



Enter the new Approver's name, email, and SMS number and click "Save."



To Enable an Approver to be used for campaigns, toggle the Enable slider. To Edit, or Delete an Approver use the widgets in the "Actions" column. Using the Search bar at the top you can search for Approvers by Name, Creator, SMS, or Email. Approvers can also be found by using the Date Range filter at the top right of the section.

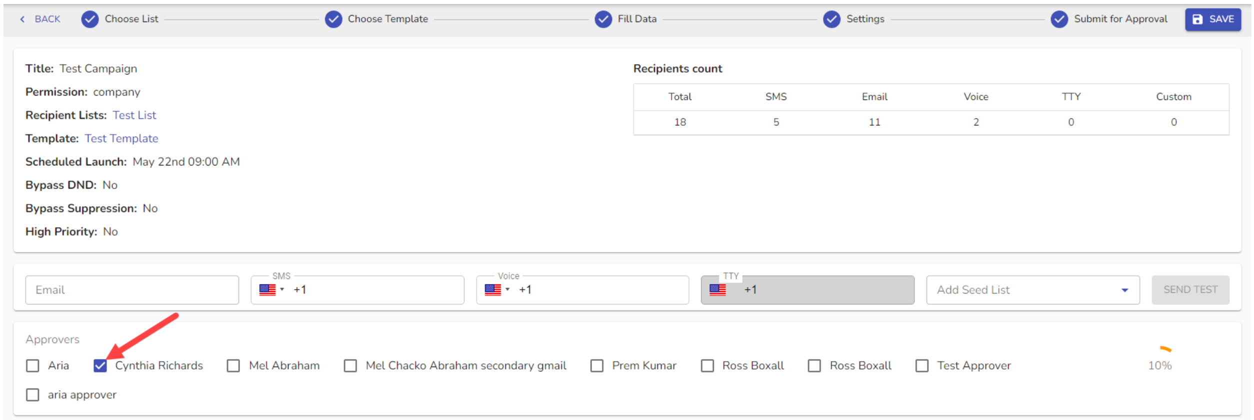


APPROVING OR REJECTING A CAMPAIGN

Selected Approver(s) will receive an email and/or SMS text message when requesting campaign launch approval.

SELECT APPROVERS TO LAUNCH THE CAMPAIGN

Once Approvers are added and a campaign is created, users must choose an Approver before launching the campaign. This sends an email and SMS message (with a LINK) to the Approver informing them that the Campaign is pending approval.

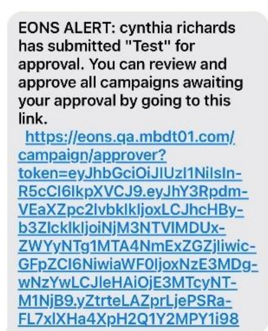


If the user does not choose an Approver, when they click "SAVE," they will receive an error telling them to select an Approver.

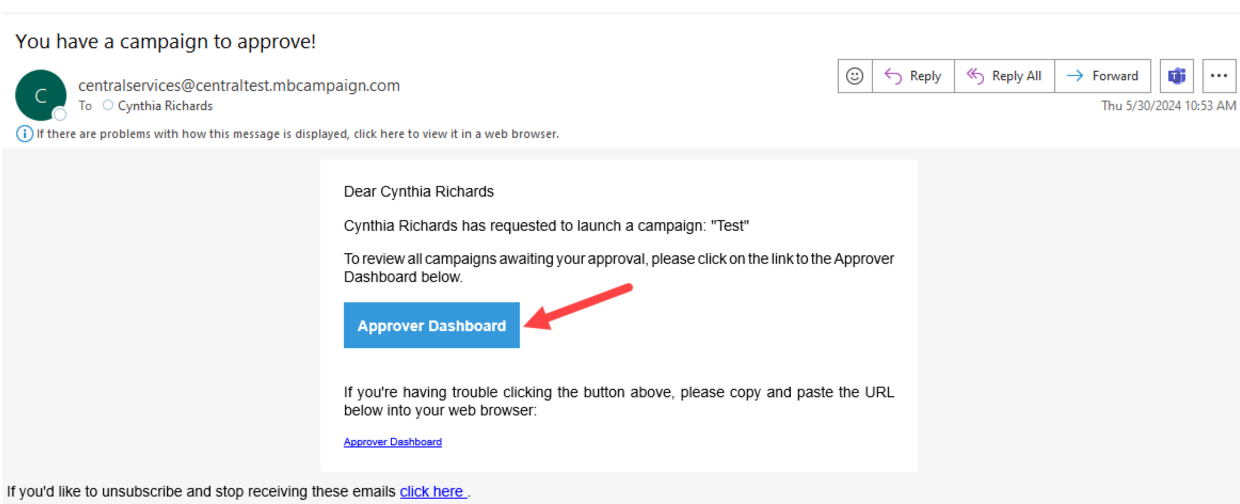
APPROVER CAMPAIGN REVIEW

The Campaign Approval Email and SMS will have a LINK to review the campaign on the Approver dashboard.

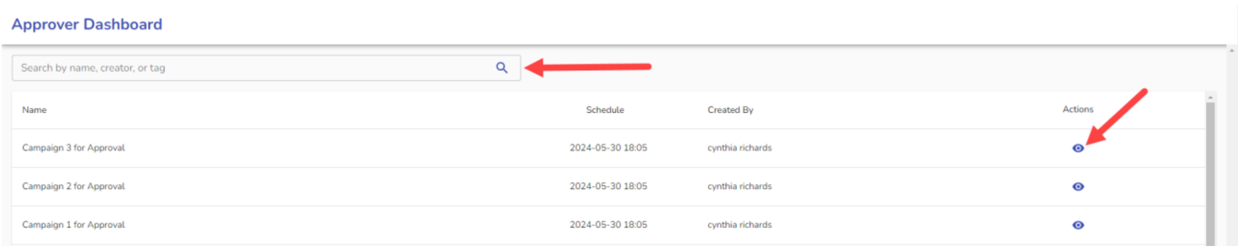
SMS Example:



Email Example:

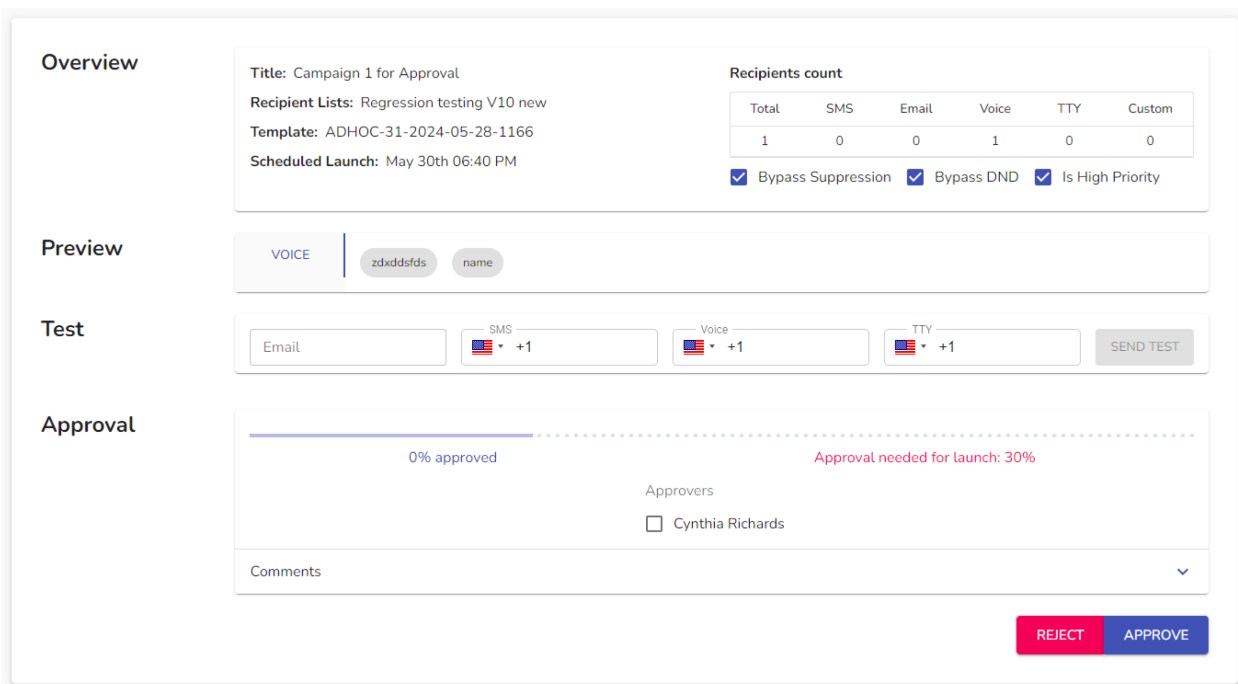


After clicking the link in the Email or SMS, the Approver is routed to the list of all campaigns which are awaiting their approval. An Approver may search for a specific Campaign based on the Campaign's name, the creator, or the associated Tag. Clicking on the icon under "Actions" will enable the Approver to review the selected Campaign.



The Campaign Approver Screen will display the content of the campaign, the number of recipients per channel, and if "Bypass Suppression," "Bypass DND," or "Is High Priority" were selected on the Campaign to be approved.

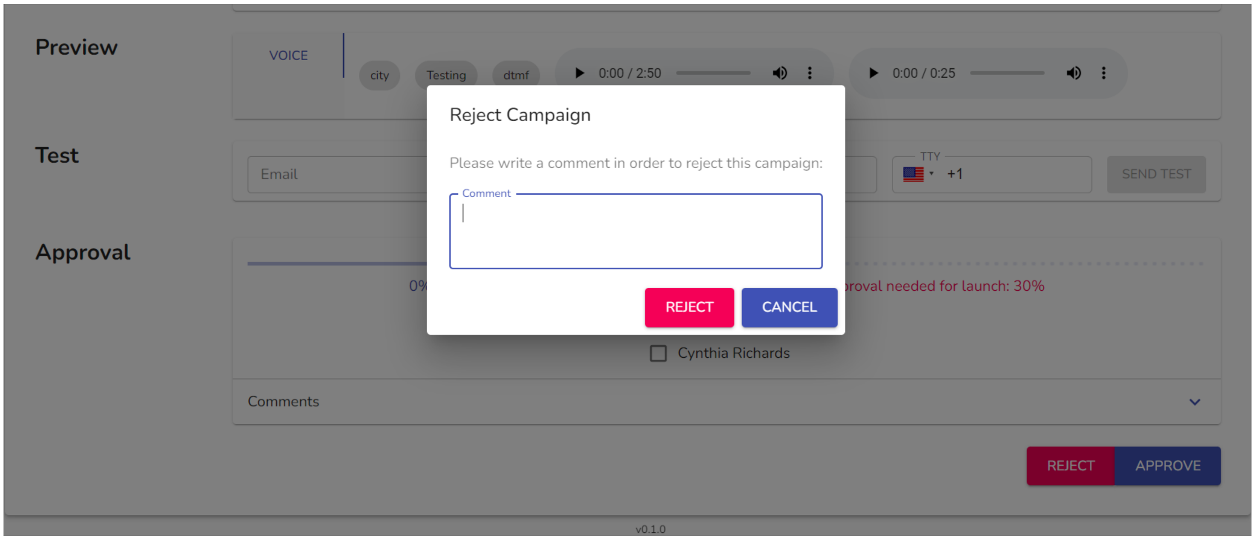
Approvers may also send themselves or others test messages to preview the campaign content before approval. Like with sending a test directly from the campaign, variables may be replaced with custom text via the Fill Target Fields popup.



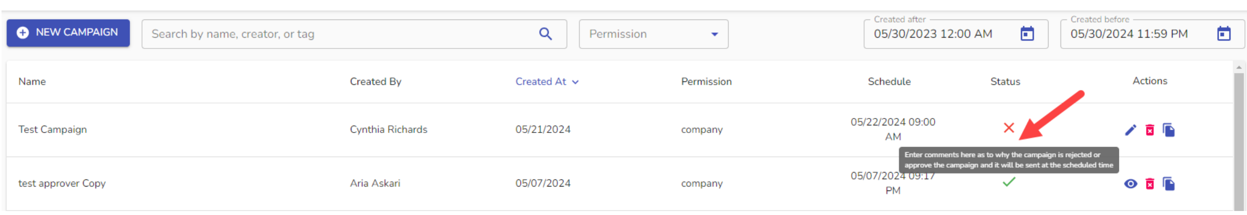
Once the Approver verifies the campaign information, click the "Approve" button on the bottom right-hand corner of the screen to approve and launch the campaign (based on the scheduled time).

A success message will appear on the screen to inform the Approver that the campaign is approved.

If there are changes needed to the campaign, click the “Reject” button on the bottom of the screen and enter comments for the campaign creator as to why the campaign was rejected.



These rejection notes will appear on the Campaign dashboard for the campaign creator.



Upon approving or rejecting the campaign, the Approver will be navigated back to the Approver Dashboard.

USER MANAGEMENT PORTAL

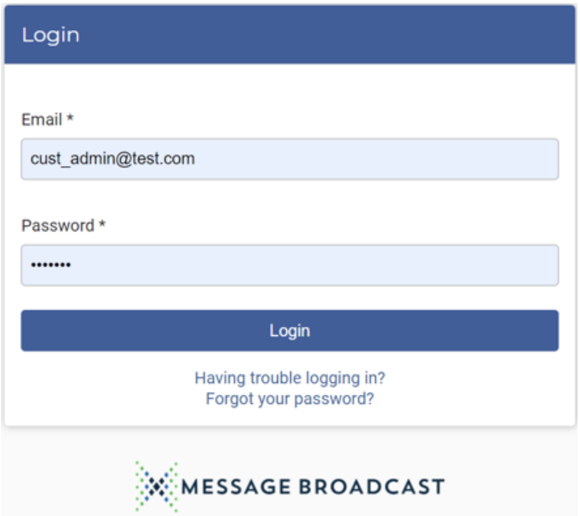
Control and manage user access to the EONS messaging platform.

**This interface is only viewable by Admins who can manage user access.

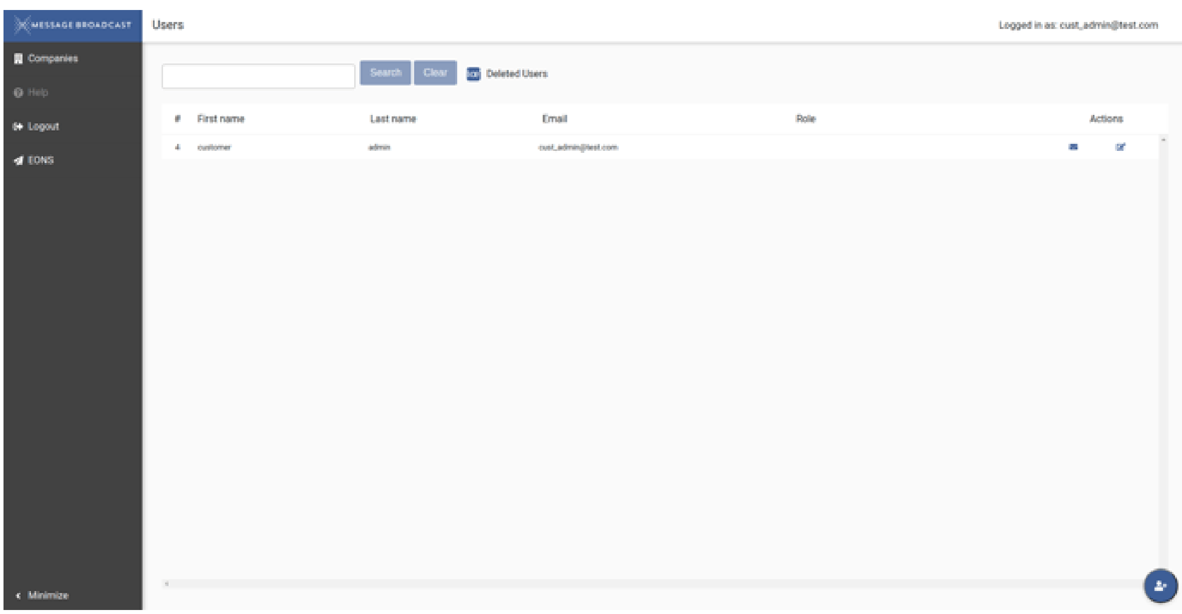
USER MANAGEMENT PORTAL LOGIN

GETTING STARTED WITH EONS USER MANAGEMENT

The EONS User Management Portal requires an Email address and Password to enter the site.

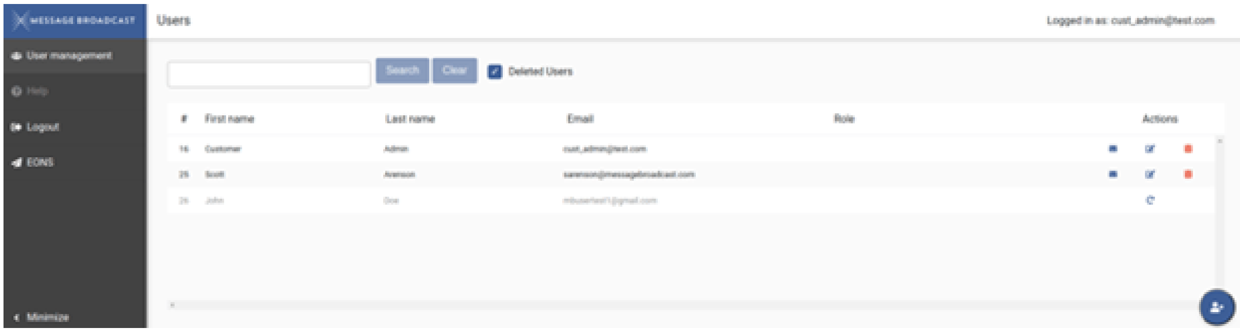


Once logged in, administrators will see the User Management Portal.



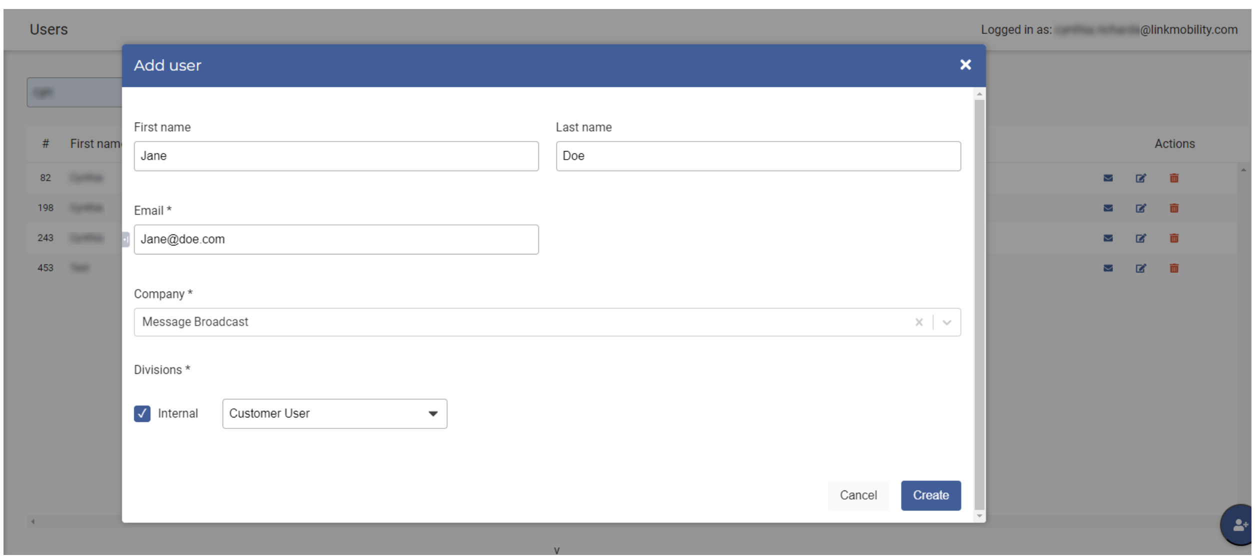
ADD OR DELETE USERS IN THE USER MANAGEMENT PORTAL

Click on the blue button at the bottom right of the "Users" screen to add a new user.



Next, add a username, email, and select the company in the drop-down menu. Check the box for each division to which the user should have access, then choose from one of the available permissions:

1. Customer User: Standard EONS access, unable to create new or delete existing Approvers, also unable to delete seed lists, inbound configurations, or keywords.
2. Customer Admin: Full admin access to create, update, and delete as applicable throughout EONS.
3. Customer Super Admin: Full admin access, plus the ability to manage users in the Management Portal. This role is limited to 1-2 users from each organization.



Note: Lists and campaigns may only be edited by the user who created them; Admins are not able to edit lists and campaigns which they did not create.

Click the "Create" button and the user will be added to the EONS portal.

To remove a user, click the red "Delete" (trash can) icon under "Actions."

Click the red “Remove” button to delete the user.