

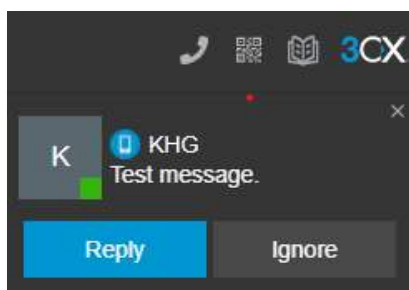
How to Handle SMS Messages with Text to Business Landline

Summary

Another way to build rapport with your clients is through Text to Landline. Text to Landline allows the ability to deliver unique customer interactions through SMS capabilities. Your 3CX system administrator has activated a NEW phone number for this service. If you have been assigned to the Text to Landline Group, your 3CX Softphone will receive texts sent by clients. If you are assigned to the text to landline group and receive an incoming text from a client, the following are ways that the SMS queue can handle the conversation.

How to Create Group Chats

Reply to respond to the text or **Ignore** to disregard the text.



If you choose to **reply** to the text, you can begin a text conversation with the client and address their inquiries or concerns.

All text-to-landline group users can interact with the same group chat simultaneously, including all the rights to:

1. view the entire chat thread
2. reply to the chat.

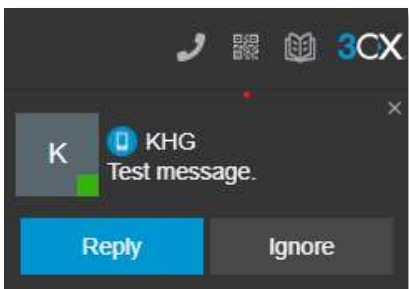
How to Create 1-on-1 Chats by Taking Ownership


Text-to-Landline group users can also **take** the chat and create a one-on-one conversation with the client. The individual who **takes** the chat would now be accountable for the chat thread and all further

incoming messages from this client. The chat thread is also removed other colleagues' queue so they can focus on new incoming text messages from other clients.



To **take** the chat and create a one-on-one conversation, you need to:

1. **Reply** to the text and begin the conversation.




2. Press the **Take** button  at the top right corner.
3. All incoming and outgoing texts from this client will now only be visible to you.

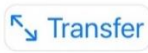
If you **take** the chat, the following consequences will happen:

1. Other group users CAN NOT text to this client anymore, unless you **Transfer**  the chat to them, or you check the **Dealt With** button
2. Other group users CAN NOT view the chat thread with this client anymore, unless you **Transfer**  the chat to them, or you check the **Dealt With** button
3. If you want to initiate a chat with this client but are unable, **this may be because the chat was already taken by another SMS group user.**

How to Transfer Taken Chats to Other Users

If you feel that the content of the text message is better suited to be handled by your colleague, you can **Transfer** the text to another user in the text to landline group. To do so:

- a. Press the **Transfer** button  on the Web Client.
- Or

- b. Press the **Transfer** button  on the Mobile App.

Once you transfer the chat to other users, the chat thread will disappear from your screen.

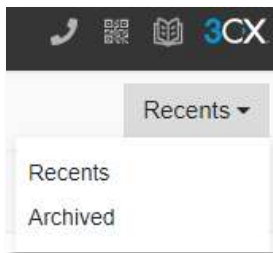
You CAN NOT initiate a chat with the same client anymore unless your colleague **Transfers the conversation** back to you.

How to Mark the Inquiry as Resolved

Once the issue or inquiry has been addressed and the customer is satisfied, you can select the checkmark to mark the issue as **dealt with**.



Texts between you and the sender will be synced to Web Client, Mobile App, Windows App, and can be reviewed in the **Chat** menu by navigating to the top right corner and selecting **Archived**.



Initiate Outgoing Texts

If you would like to initiate a new chat with a client, please follow the below instructions:

1. In the 3CX app, navigate to **Chat**.
2. If you are using the 3CX web client, click on the compose chat symbol **+** to initiate a new **SMS** chat.
3. To text an external phone number, type “+” and “1”, followed by the 10-digit number you wish to text.

Once the chat is initiated, you can transfer or end the chat by selecting **Transfer** or **Dealt with** as you can do with incoming texts.