## TrustUC Business Messaging Powered By Clerk Chat

Clerk Chat is a platform that enables personalized and automated communications with customers and employees through texting. Your Clerk Chat account will be set up for you by a System Administrator. You will need to log in and add Clerk Chat to your Webex App Sidebar.
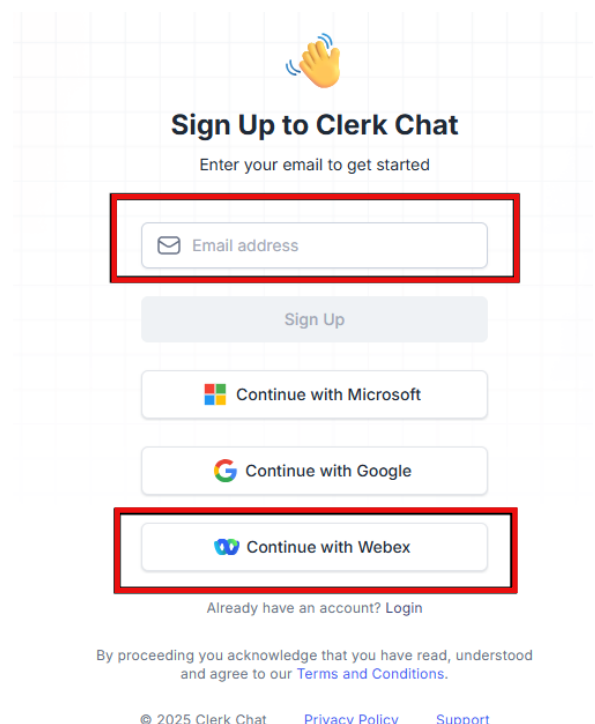
Integrate Clerk Chat With Webex

+ In Webex App, go to **More>App Hub** and search **Clerk Chat.**

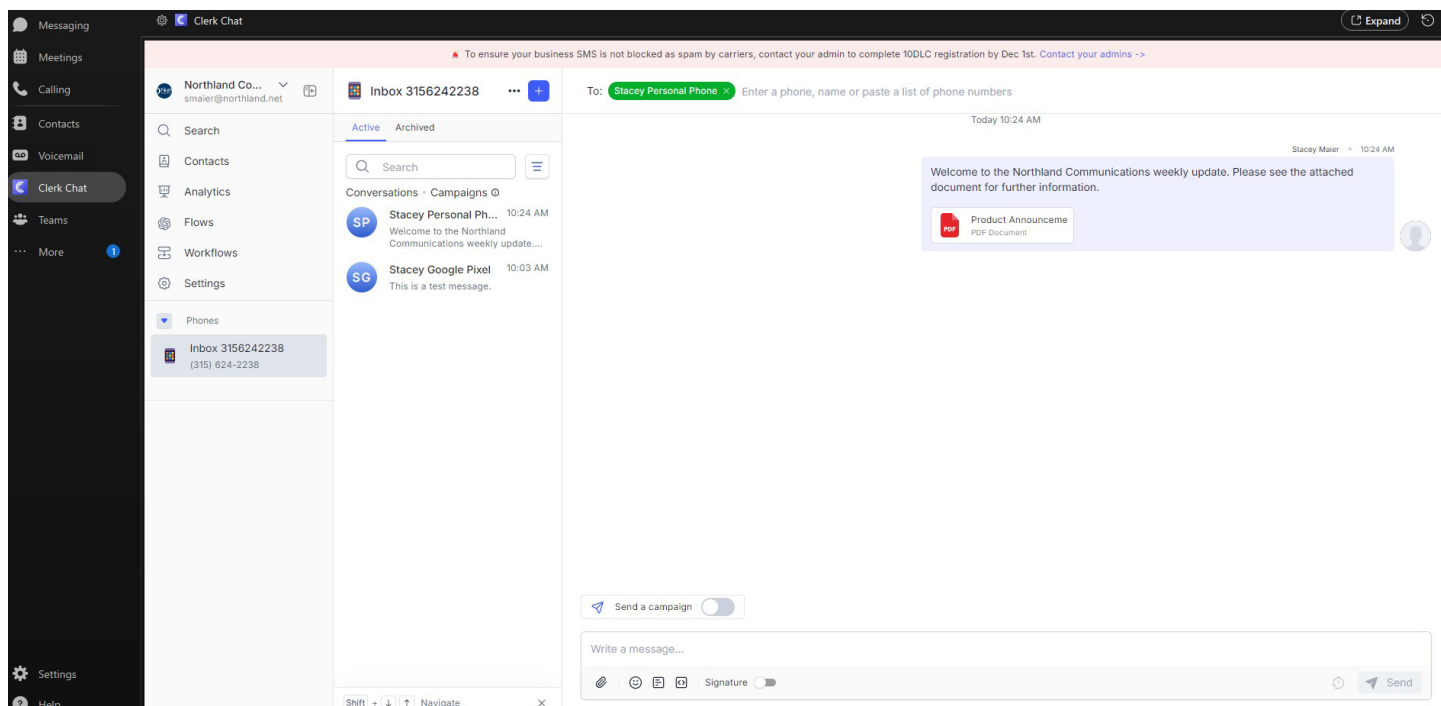+ Select **Add App.** *The app now appears in your Webex Apps.*
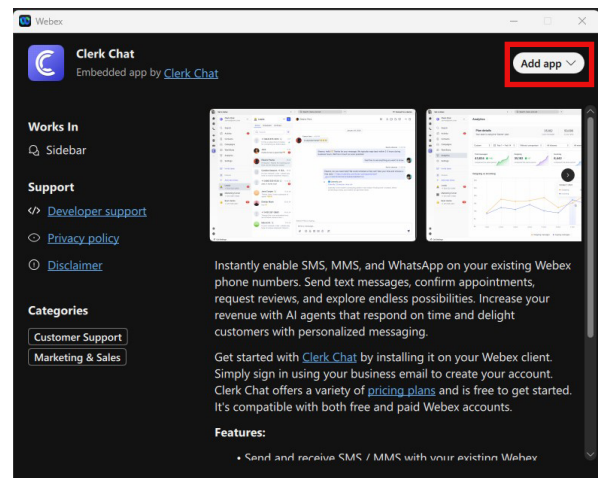
Signing Into Webex

You will need to sign in with your Webex credentials. Once you sign in with your Webex credentials you will start getting notifications through the application.

Clerk Chat Home Screen

Search: Search Contacts, Conversations, Inboxes and Workspaces.

Contacts: View Contacts, Cohorts and Block list. Add or import contacts from other sources.

Analytics: View Analytics for Outgoing and Incoming messages. Show comparison between current and previous periods or years. Filter by inboxes and/or members.

Flows: Set up your own AI Assistant by uploading enterprise domain specific documents to train the Clerk Chat AI bot and establish protocols for automated responses to customer inquiries. (Not covered in this QRG).

Workflows: Provides a user with the ability to build automated treatment and responses to incoming messages when the user is unavailable.
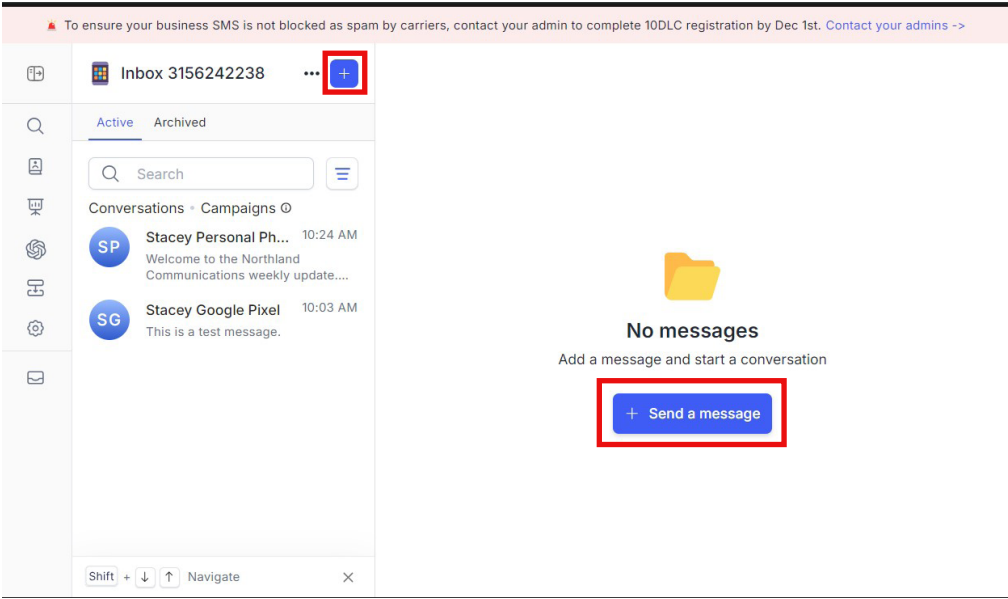
Workflows can be built to trigger off time of day, day of week, specific words contained within the body of the message to streamline your business communication and provide prompt responses to your contacts during your away hours. (Available only with the Ultimate License and not covered in the QRG.).

Settings: Update your Avatar, personal data and create a custom signature.

Phones: Displays all inboxes assigned to you. Set up out of office and business hour perameters through phonesettings.
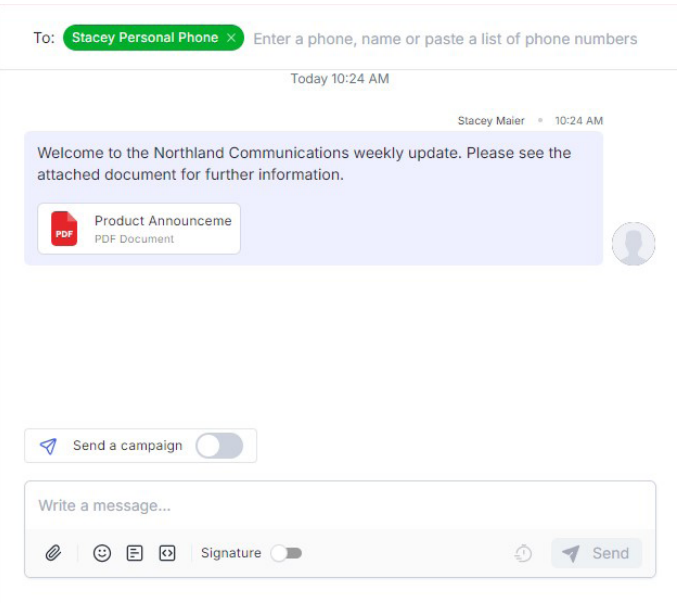
NOTE: Collapse and expand the ribbon by selecting the Collapse / Expand icon ⊞ in the top of the ribbon window.

Send An SMS Message

🔲 Inbox 3156242238 ... **+**

Active Archived

🔍 Search ≡

Conversations • Campaigns ⓘ

SP **Stacey Personal Ph...** 10:24 AM
Welcome to the Northland
Communications weekly update....

SG **Stacey Google Pixel** 10:03 AM
This is a test message.

📁

No messages
Add a message and start a conversation

+ Send a message

Shift + ↓ ↑ Navigate ✕

Send A Message From The Inbox Screen

+ Select an inbox to send the message from

+ Select the **+** at the top of the inbox window or select send a message in the body of the window.
OR

+ Select a conversation to send a message to the same person or group.

To: **Stacey Personal Phone ✕** Enter a phone, name or paste a list of phone numbers

Today 10:24 AM

Stacey Maier • 10:24 AM

Welcome to the Northland Communications weekly update. Please see the attached document for further information.

📄 **Product Announceme**
PDF Document

✈ Send a campaign ⚪

Write a message...

📎 ☺ ▣ ‹› Signature ⚪ ⏱ ✈ Send

+ In the message window, enter a phone, name or paste a list of phone numbers in the "To:" field.

+ Enter your message below. Be sure to include any attachments.
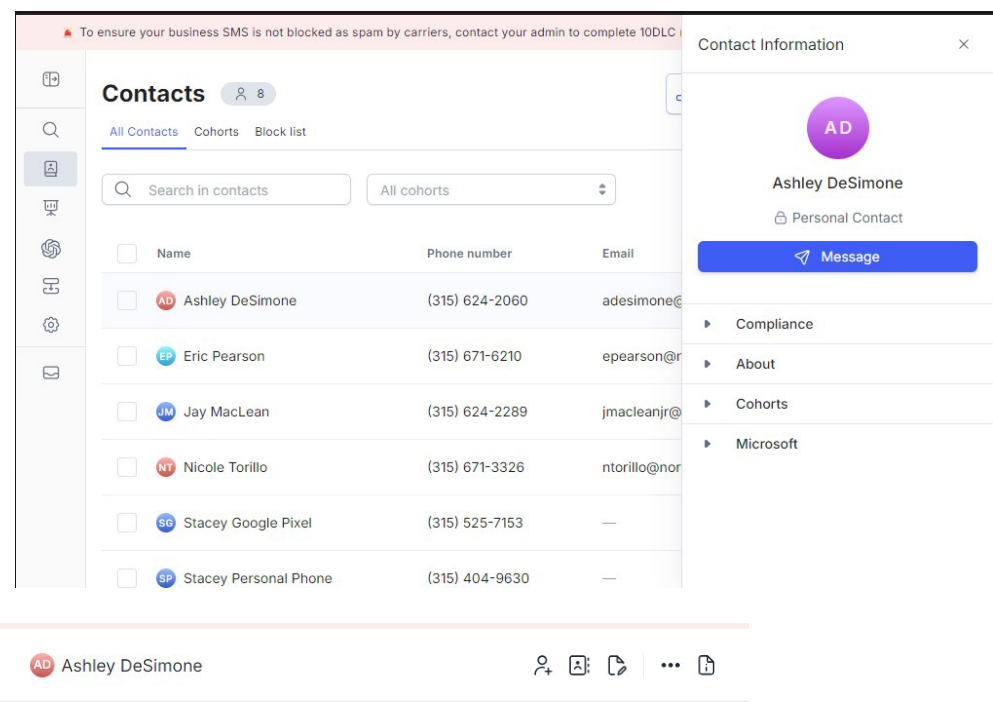
+ When your message is ready, click **Send.**
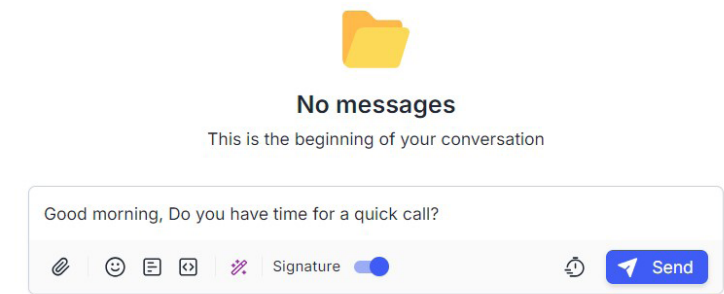
Additional Options

1 2 3 4 5 6   7

📎 ☺ ▣ ‹› ✨ Signature ⚪   ⏱

1	Attach a file or picture.
2	Include an emoji.
3	Add a variable from your Settings. (for example: Name)
4	Create or add a custom template.
5	Get AI Assistant to help with an answer.
6	Add the custom signature you create in Settings.
7	Define a schedule for the message to be sent.

Send A Message From Contacts

+ Select a Contact from the Contact List. *The contact information is displayed on the right.*

+ Select [✈ Message] *The message window opens for the contact selected.*

+ Enter your message below. Be sure to include any attachments.

+ When your message is ready, click **Send.**


Additional Contact Options

|	
1	Assign a team member.
2	Add to cohort (goup).
3	Get an AI summary of the conversation.
4	More: Mute, Mark Unread, Archive, Block, Export Logs
5	Show contact details.

Add A Contact

Contacts must be added manually. They do not autopopulate. You can add contacts individually or import them from other applications.

+ To add a contact, go to the Contacts tab.
+ Select Add Contact to add an individual contact.
+ Select Import Contacts to upload contacts from Microsoft Outlook, Salesforce, a .csv file and other applications.
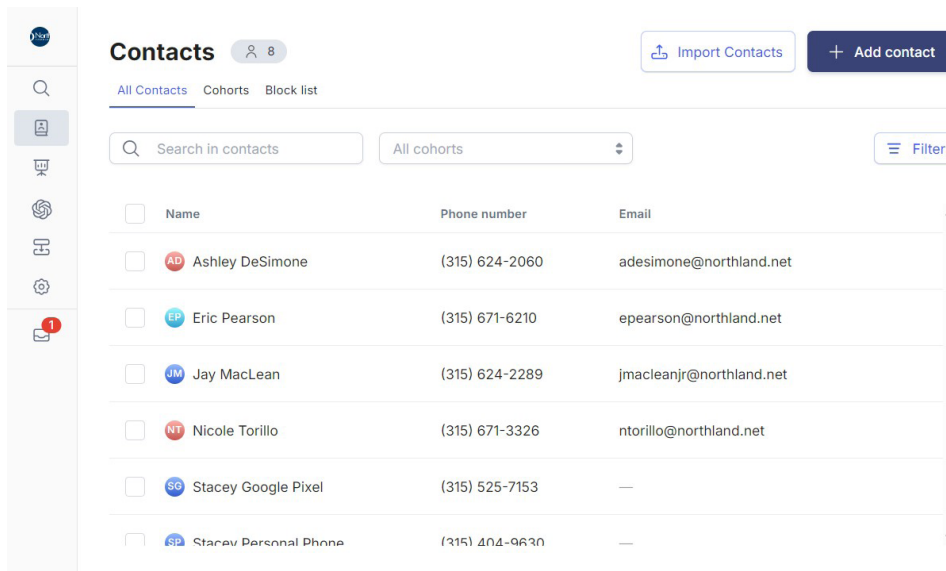
Message Notifications

When you receive a new SMS Message you will be notified through Webex App.
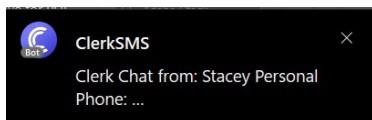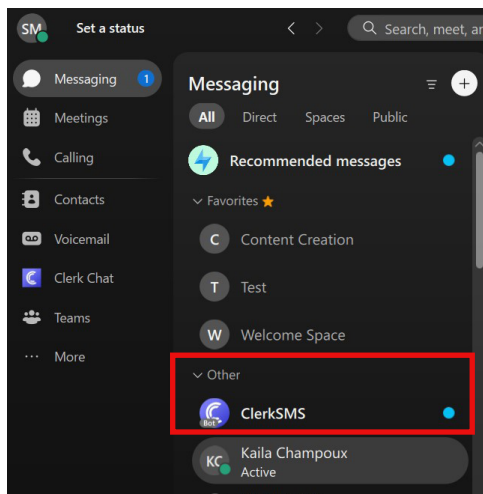
 A pop up appears   A new message indicator is displayed

Once you open Webex App, new Clerk Chat messages appear in their own space. When you click on the space, it opens Clerk Chat.

Business Messaging Free Account

For organizations using the Free package, the 1,000-message monthly limit is shared across all users within the organization under a single pool. If you hit the limit of 1,000 messages, you will receive a notification. If you need to upgrade, please contact support.

Contact Telesystem

You've reached your message limit for our Business Messaging product. To continue uninterrupted service and unlock additional messaging capacity, you can upgrade your account, add users, or expand your team's inboxes.

Our team is here to help! Contact us today:
📞 Phone: 888.808.6111
📧 Email: Support@trusttelesystem.com

We appreciate your business and look forward to assisting you!