



Help On-Demand Customizing “Follow-Up Message on Acceptance”

What is the Follow-Up Text Messaging Functionality?

The “Follow-Up Message on Acceptance” feature allows consumers to opt in, at the time of submitting a request for assistance, to receive a text message notification once their referral has been accepted by a Certified Enroller. As a Certified Enroller, you have the ability to customize the outgoing follow-up message by including or partially masking details about yourself, creating a more personalized experience for the consumer.

A screenshot of a web form titled "Follow-Up Message on Acceptance". The form contains two dropdown menus for "City" and "Preferred Language". Below these are two questions with radio button options: "Would you like a follow-up text message once your request is accepted? Standard text message and data charges may apply from your wireless provider." and "Would you like to participate in a follow up Survey?". Both questions have "Yes" and "No" options. At the bottom is a large pink "SUBMIT" button.

How to Customize Outgoing Message

Follow these simple steps to customize the outgoing “Follow-up Message on Acceptance”:

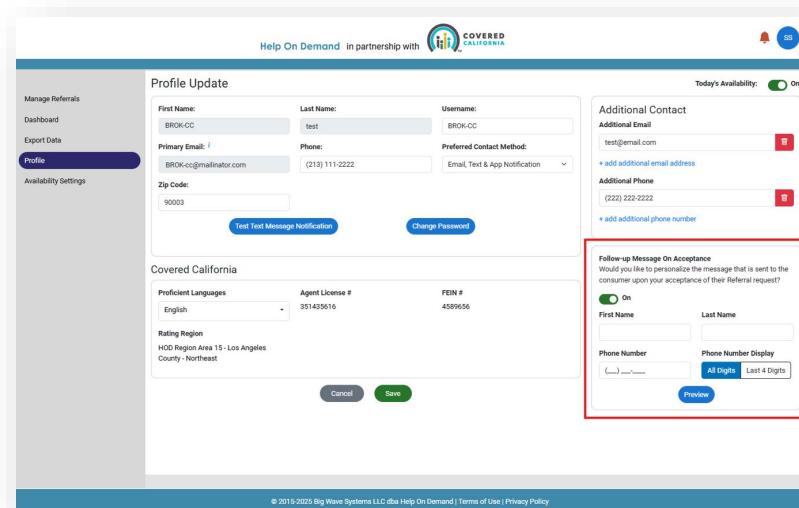
1. **Log In to Your HOD Account**

Navigate to the “Profile” page after logging into your account.

A screenshot of the "Profile Update" page in the Help On Demand system. The page has a sidebar on the left with links: "Manage Referrals", "Dashboard", "Export Data", "Profile" (highlighted with a red box), and "Availability Settings". The main content area contains fields for "First Name", "Last Name", "Username", "Primary Email", "Phone", "Zip Code", and "Preferred Contact Method". Below these fields are two buttons: "Test Text Message Notification" and "Change Password". The footer of the page says "Covered California".

2. Locate the "Follow-Up Message On Acceptance" Section

Find this section in the lower-right corner of your profile settings.



Help On Demand in partnership with **COVERED CALIFORNIA**

Today's Availability: ☒ On

Profile Update

First Name: BROK-CC Last Name: test Username: BROK-CC

Primary Email: BROK-CC@gmailator.com Phone: (213) 111-2222 Preferred Contact Method: Email, Text & App Notification

Zip Code: 90003

Test Text Message Notification Change Password

Covered California

Proficient Languages: English Agent License #: 301435616 FEIN #: 4589556

Rating Region: HDQ Region Area 15 - Los Angeles County - Northeast

Cancel Save

Additional Contact

Additional Email: test@gmail.com + add additional email address

Additional Phone: (222) 222-2222 + add additional phone number

Follow-up Message On Acceptance

Would you like to personalize the message that is sent to the consumer upon your acceptance of their Referral request?

☒ On

First Name Last Name

Phone Number Phone Number Display

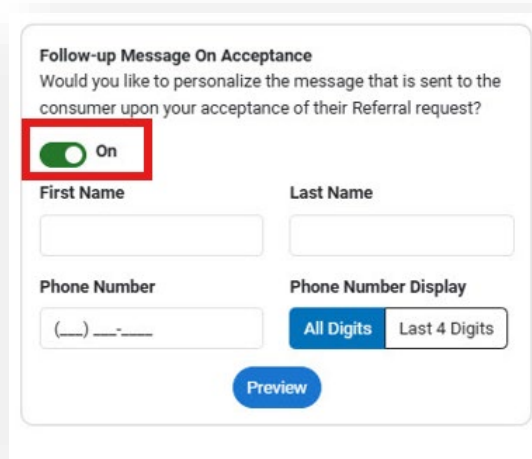
() - - All Digits Last 4 Digits

Preview

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3. Enable or Disable the Follow-Up Messaging Personalization Feature

- Toggle the feature ON to enable personalization or OFF to send consumers a generic message without agent details.
- You do not need to activate this feature for consumers to receive a generic message, but enabling it allows you to add and customize how your name and phone number appear in the text message.



Follow-up Message On Acceptance

Would you like to personalize the message that is sent to the consumer upon your acceptance of their Referral request?

☒ On

First Name Last Name

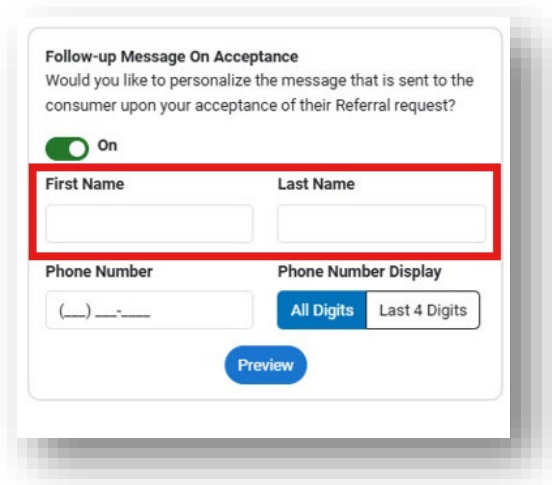
Phone Number Phone Number Display

() - - All Digits Last 4 Digits

Preview

4. Customize How Your Name Appears

- Enter your first and last name as you would want them to appear in the consumer text message in the “First Name” and “Last Name” fields.
- You can choose to display a partially masked name (e.g., showing only the first letter of your last name like "Karen S.")



Follow-up Message On Acceptance
Would you like to personalize the message that is sent to the consumer upon your acceptance of their Referral request?

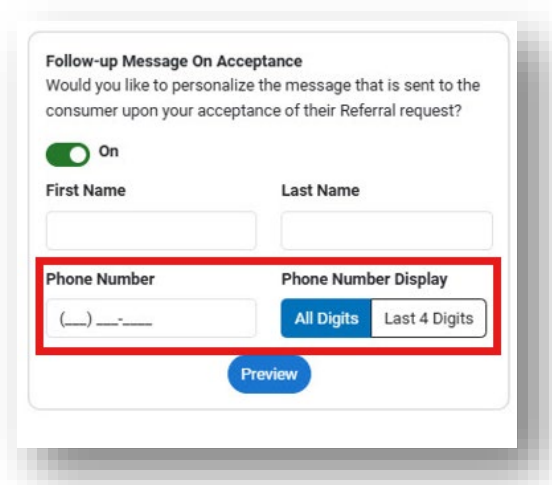
☒ On

First Name **Last Name**

Phone Number **Phone Number Display**

5. Customize Your Phone Number Display

- Enter your phone number in the “Phone Number” field.
- Select how your phone number will appear in the text message:
 - **All Digits:** (123)-456-7890
 - **Only Last 4 Digits Displayed:** (xxx)-xxx-7890



Follow-up Message On Acceptance
Would you like to personalize the message that is sent to the consumer upon your acceptance of their Referral request?

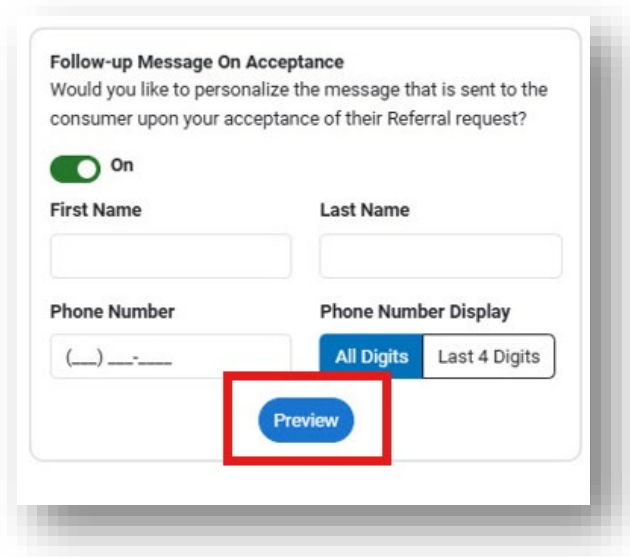
☒ On

First Name **Last Name**

Phone Number **Phone Number Display**

6. Preview the Consumer Message

- Click “Preview” to view how the text message will appear based on your customizations.



Follow-up Message On Acceptance
Would you like to personalize the message that is sent to the consumer upon your acceptance of their Referral request?

☒ On

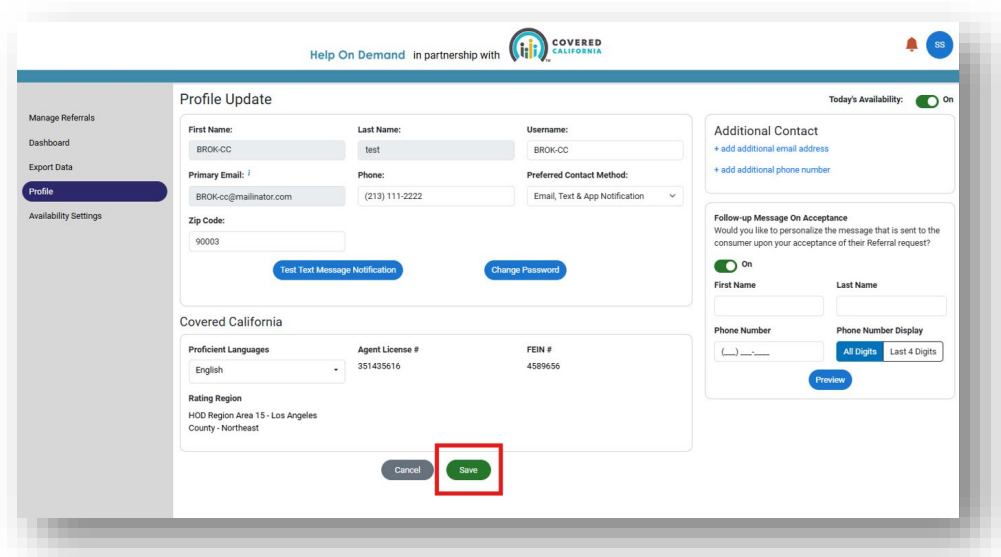
First Name Last Name


Phone Number Phone Number Display

() - - -

7. Save Your Changes

- Click the “Save” button located in the center of the profile page to apply and save your updates.



Help On Demand in partnership with 

Today's Availability: ☒ On

Profile Update

First Name: Last Name: Username:

Primary Email: Phone: Preferred Contact Method:

Zip Code:

Covered California

Proficient Languages: Agent License #: FEIN #:

Rating Region:

Additional Contact
[+ add additional email address](#)
[+ add additional phone number](#)

Follow-up Message On Acceptance
Would you like to personalize the message that is sent to the consumer upon your acceptance of their Referral request?

☒ On

First Name Last Name

Phone Number Phone Number Display

() - - -