



# PROKEEP

Supporting Prokeep and Best  
Practices

# **Effectively Introducing a New Team Member to Prokeep**

# Show Value in Prokeep

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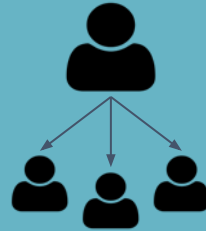
Less Time  
On Phone



Accountability



Multitasking



Save Time



# Encourage Proper Use and Understanding

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- ❑ Setup their account and make sure they have access



- ❑ Share information like the Prokeep Knowledge Base



- ❑ Making sure they know who they can go to with questions  
(Support or a team member with heavy usage)



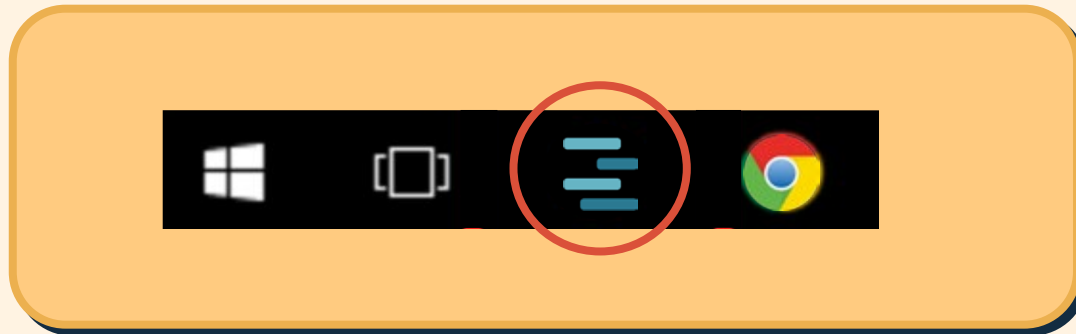
- ❑ Share a webinar recap with them

**Drive Efficiency with Daily Use of  
Prokeep**

# Ensure Users Login Each Morning

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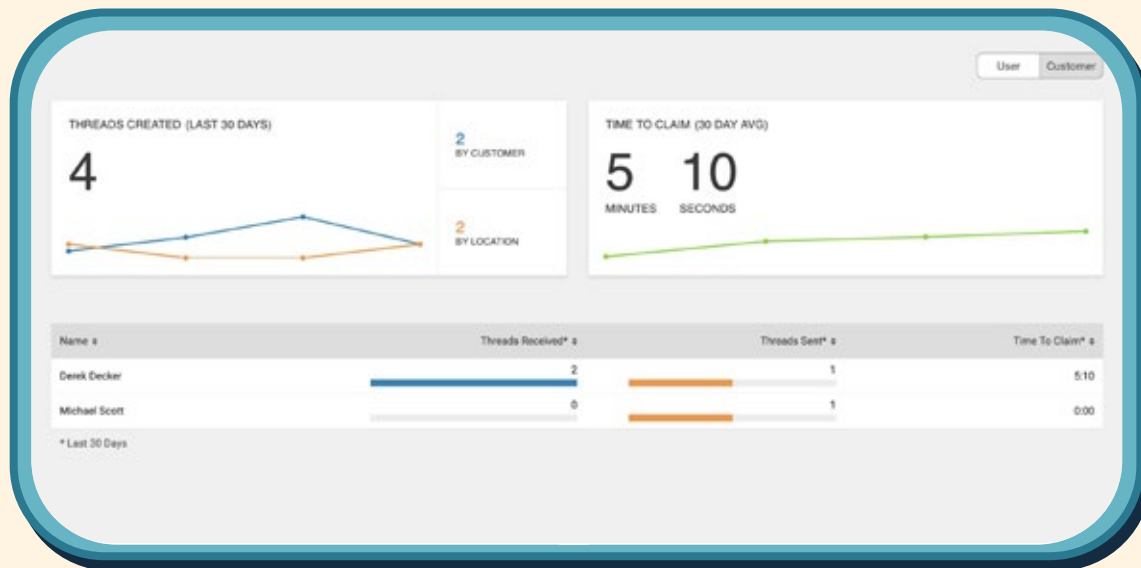
- ❑ They will receive notifications each time a customer sends you a message. You must be logged in to receive notifications.
- ❑ To make this easier, you can save Prokeep as a desktop icon for them so they can easily access the platform every morning.





# Monitor Progress Via Reports

- The reports section tracks many stats including a breakdown per staff member. Leverage this to track progress.

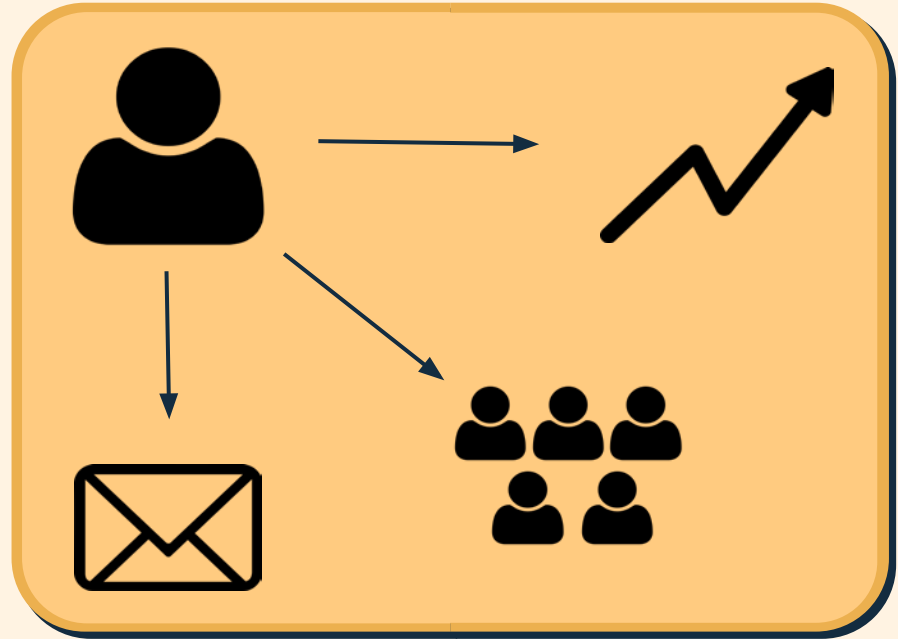




# Assign a Team Member to Manage Prokeep

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- Having a team member monitor Prokeep for Best Practices makes the experience of using Prokeep better for the whole Team.



# Customer Awareness

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- ❑ There are various ways you can make your customers aware that they can now text your landline!

**Proactive Texting**

**Welcome Message**

**Flyers & Posters**

**Personal Text Via ProKeep**

**Changing Hold Message**

# **User Best Practices - Daily Processes**

# Users Are Responsible for Their Threads

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- ❑ Users are responsible for completing each thread they claim or start.
- ❑ Thread ownership ensures each customer is serviced in a timely manner.



# Enter Contact Info for Every Customer

- ❑ Once you add contact information to unknown phone numbers, everyone at your company will know which customer is sending you the order.
- ❑ This allows you to send your customer order updates or delivery updates through Prokeep later on.



The screenshot shows a mobile application interface for editing customer contact information. The form is titled "Edit John Doe" and includes a close button (X) in the top right corner. The form fields are as follows:

COMPANY	
ABC Plumbing (with close icon)	
FIRST NAME	LAST NAME
John	Doe
CELL NUMBER	EMAIL ADDRESS
800-555-5555	johndoe@abcplumbing.com
<b>Submit</b>	

# Send Updates Via Text

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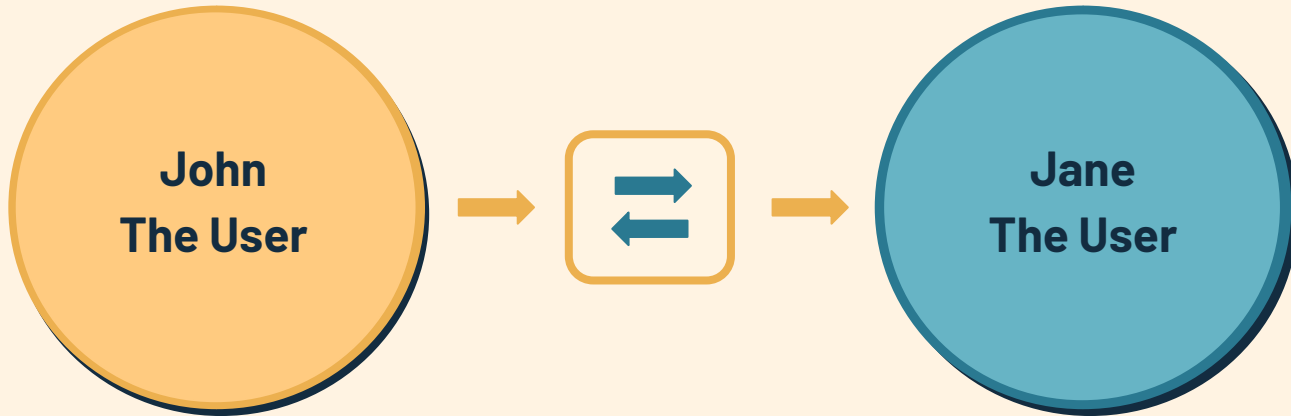
- ❑ You will save time by sending customers updates via text instead of using the phone.



# Transfer a Thread

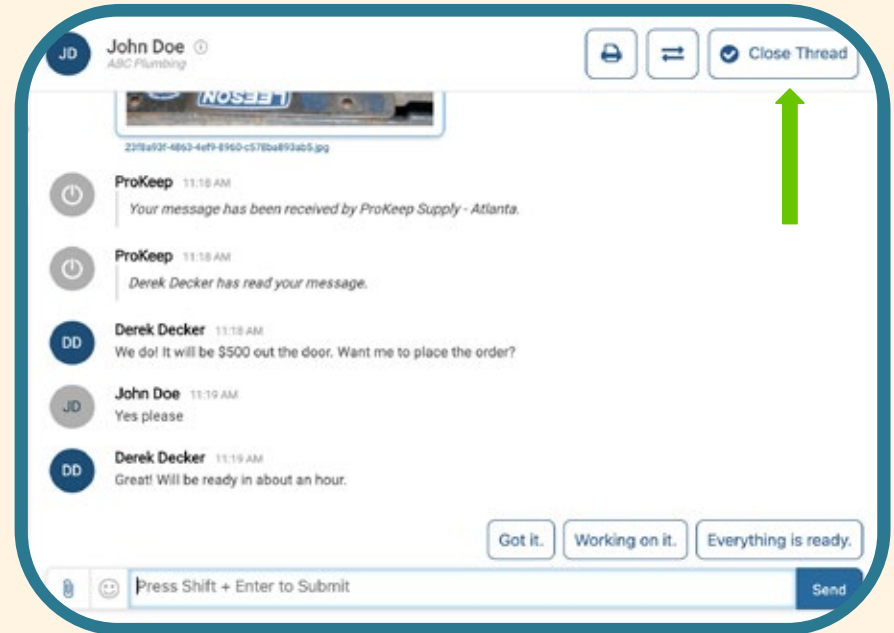
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- ❑ If you are not the best person to answer a message, transfer the message to another user better suited to help the customers.



# Close Threads in a Timely Manner

- ❏ Closing a thread once the conversation is over will ensure everyone is notified the next time the customer needs help.





# Supported Browsers

Compatible



Compatible



Compatible



Not  
Compatible



<b>Menu:</b>	<b>Administrator</b>	<b>Manager</b>	<b>Member</b>
Inbox	✓	✓	✓
Threads	✓	✓	✓
Contacts	✓	✓	✓
Reports	✓	✓	✗
Search	✓	✓	✓
<b>Settings:</b>	<b>Administrator</b>	<b>Manager</b>	<b>Member</b>
My Account	✓	✓	✓
Preferences	✓	✓	✓
After Hours Message	✓	✓	✗
Sharing Settings	✓	✗	✗
Users	✓	✓	✗
Customer Import	✓	✓	✗
Blocked Numbers	✓	✗	✗
Support & Feedback	✓	✓	✓



# PROKEEP

## Support and Feedback

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Email: [support@prokeep.com](mailto:support@prokeep.com)