

SMS Campaign Manager User Guide

I. Introduction

SMS Campaign Manager provides easy-to-use Web based interface for creating and managing mobile oriented campaigns and services as Text, MMS, etc.

Text services

SMS Campaign Manager provides a wide range of features for providing Text based services. From the Web interface the user is able to:

- Broadcast a Text Message, with individual message personalization
- Broadcast a Previously Saved Message

All Broadcast services enable the Message to be scheduled (once saved) for later or repeated sends.

II. Accessing SMS Campaign Manager

Once you'll receive your login details, you can immediately start working with the SMS Campaign Manager.

In case you forgot your password or login just click on link "Forgot your password" and enter your username or email address below and we will send you a new password to your email address.

Once logged into the account you are able to view all campaigns and account details. Any account user can set a default campaign summary page to view upon login.

II.1. User Account

Management

Change user details

This allows you to change your user account details.

Campaigns

This allows you to view your active campaigns.

Routing

Identifiers

This page shows a list of Interaction Identifiers and the campaigns with which they are currently associated. An Interaction Identifier allows inbound interactions to be routed through to a campaign.

Example: Email addresses and GSM short codes or long numbers identified with the campaign. Interaction Identifiers cannot be shared between campaigns unless a keyword is added.

II.2. Campaign Menu

This page enables the management of the selected campaign. Campaign description is shown on the top of the page.

Sending Messages

You can send the following types of messages:

- A text message
- A saved message

A Text

"Text" enables the sending of a one-off, text message to any interaction groups. It also allows the message interaction to be saved as a profile.

A Saved Message

This page gives you access to and allows you to send any message profiles that you saved previously.

Reporting

Current Interactions

This page allows you to view the content and details of any real-time interactions being sent through a selected campaign. The figure displayed adjacent to the interaction link is the total of interactions sent 'Today'. This page shows the last 100 interactions for the selected campaign. The page automatically refreshes every few seconds therefore it may be necessary to stop the automatic refresh by clicking on the red icon with a cross if the data displayed is to be studied. To restart the automatic refresh, click on the double green arrow icon.

Summary Page

The Campaign Summary page provides a quick "Dash Board" view of the campaign. It Summarizes the most recent interactions, number of interactions in last 5 minutes, hour and day and the Groups and Schedule Events on the campaign.

Query Tool

Query Tool is used to review data on people within the campaign based on either membership of a group(s) or stored CRM data on the person. Multiple conditions can be compounded to create sophisticated layer queries.

II.3. Campaign Menu

Group Management

Import CSV Files

The Import CSV Files page enables the upload of records for your sender groups from CSV (Comma Separated) files via the Browse button.

To upload a group

- 1 Click on the 'Browse' button to search the file system for the required file to upload.
- 2 Select the appropriate file format from the drop-down list by clicking on the arrow and highlighting the required format. (The most common are “phone, group” and “variable format (comma delimiter)”)
- 3 Click on the 'Upload File' button.

How to Create Upload Files

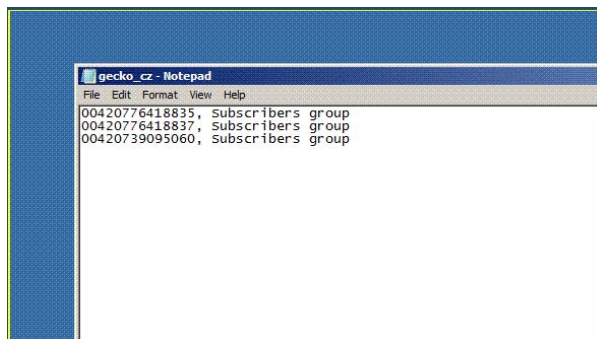
CSV Files

Comma Separated Value files are columns of data separated by commas. They can be easily created in Microsoft Excel or Notepad.

Step 1

First copy your customer records into Excel and format as detailed below. Formats are the type and order of data you wish to import into the SMS Campaign Manager platform. Numerous file import options are supported by the SMS Campaign Manager and others can be accommodated on request

The simplest format is: Phone, Group 00420776418835, Subscribers group 00420776418837, Subscribers group 00420799095060, Subscribers group



The mobile number must be provided either in your local country format, for example 07764188356 in U.K format, or one of the international number formats: 00447764188356 or +447764188356.

Save your list to a CSV (Comma Separated Value) file. In Microsoft Excel use the 'Save As' option, save your file as a CSV format file.

In Excel, your columns should be formatted for 'Text', this stops the leading zero (0) disappearing. Also when you 'save as', we suggest you save as a MS-DOS format CSV

Step 2

Since you have created from your list a CSV format file, the data can be imported using the 'Import CSV Files' option under the 'Group Management' section within your Campaign.

Step 3

The 'Import CSV Files' option takes you to the 'Upload Groups' page.

Within this page you select:

- 1 Your saved CSV format file (the extension of the file must be CSV)
- 2 The format of your file e.g. 'phone, group'.

The available valid formats are listed in the drop down box. Select the format that matches your CSV file. If you require a special upload format, please contact us.

Step 4

After selecting the 'Upload File' button you are taken to the 'Upload Status' page.

On completion of the upload the status page will report how many records were uploaded, how many were rejected and how long the process took. Any rejections will be displayed and the list of failed records can be downloaded for further reporting.



Import CSV Files

The Import CSV Files page enables the upload of records for your sender groups from CSV (Comma Separated) files.

Add Person

The Add Person allows you to add individual members to your sender groups. Person Properties Allows you to search for an ad hoc person, by mobile number, e-mail, PIN, or voucher.

Administration

Manage Jobs

This page shows the state of all the jobs currently associated with a selected campaign. The jobs can be started or stopped depending on their current state.

- processors manage background jobs or tasks within the account. Such as
- group uploads
- broadcasts
- report generation.

Saved Messages

This allows you to view any message profiles that you have already saved as templates.

Scheduled Events

Scheduling allows you to view any message profiles that you have saved for future broadcast. These can be scheduled under Send "Saved Message" To edit any scheduled broadcasts that you have saved, click on the name of the scheduled message. The Edit Task page allows you to change any detail of the schedule. You must set

- 1 a date
- 2 a time
- 3 whether you want a one off message or repeated sends

Groups

"Groups" allow you to view any mailing groups that you have created. To add a group click on the '+' symbol.

Queries

Allows saved Queries to be run.

III.Messages

To reach the broadcasting pages for your messages, click on the name of the required campaign.

Send

This page enables the writing and sending of interactions. Follow the steps below to construct an interaction.

- 1 Enter the message you wish to send in the space provided. Mobile telephones can accept a maximum of 160 characters per text message. For this reason, your message length must not exceed this limit. Example. Text Message: "This is a test message."
- 2 Select the recipient groups. All groups within the selected campaign are listed. Tick the check-box next to each group you wish to be included in the broadcast. A minimum of one group must be selected.
- 3 Select the sender of the message. This is the value that will appear as the sender of the message on the recipient's mobile phone. Select the desired value from the drop-down list. If no names appear in the drop-down box, or you would like additional name(s) added, please contact your account manager. Please ensure that you have your account and campaign details available.
- 4 If you wish to send the interaction immediately click the 'Send now' button. Alternatively, once an interaction is created it may be saved as a 'profile'. This will enable you to reuse the message.

Interaction Limit Reached

If this message is displayed you do not have any interactions remaining on your campaign. If you would like to purchase further interactions, please contact your account manager. Please ensure that you have your account and campaign details available.

Send Now Button Disabled

If you have a disabled 'Send now' button, you either do not have any interactions in your account, or you do not have a 'sender' set in the 'Select the sender of the message' space. To purchase interactions or to set a sender please contact your account manager. Please ensure that you have your account and campaign details available.

Confirm Broadcast

This page enables the message and recipient information to be confirmed as correct. If all information is correct, click on the 'OK' button to continue the broadcast. Otherwise click on the 'Cancel' button to abort the broadcast.

Incorrect Message or Groups Selected

If the message is incorrect or the wrong group is selected, click on the 'Cancel' button to return to the 'Broadcast A Interaction' page where the message can be rewritten and the group can be re-selected.

Over limit Notice

If a red 'Over limit' message appears, the campaign has insufficient interactions assigned to it to be able to send the message to all group members.

- The groups can be edited to reduce the number of members, or smaller groups can be selected to receive your message.
- Alternatively, contact the account manager to purchase some more interactions. Please ensure that you have your account and campaign details available.

Send a Saved Message

To send a Saved Message

- 1 Select Save Message Select the desired Saved Message from the drop-down list by clicking on the arrow and clicking on the appropriate profile. If the Message is to be Sent immediately, click the 'Send now' button. If the Message is to be sent at a later time, proceed to Step 2.
- 2 Select the date to send the Message. Either enter the desired date in the space provided or click the calendar icon and select the desired date from the calendar.
- 3 Select the time to send the Message. From the two drop-down lists select the required schedule time. (24 hour clock).
4. Save the schedule by clicking the 'Schedule send' button.

Confirm Scheduled Broadcast

This page enables the selected profile and scheduled send information to be confirmed as correct. If all information is correct, click on the 'OK' button to continue the broadcast. If not, click on the 'Cancel' button to stop the broadcast.

Incorrect Profile or Scheduled send time

If the profile or the scheduled send time are incorrect. Click on the 'Cancel' button to return to the 'Send A Saved Message' page where the message can be rewritten and the schedule time can be re-selected.

Over limit Notice

If a red 'Over limit' message appears, the campaign has insufficient interactions assigned to it to be able to send the message to all group members.

- The groups can be edited to reduce the number of members, or smaller groups can be selected to receive your message.
- Alternatively, contact the account manager to purchase some more interactions. Please ensure that you have your account and campaign details available.

Saved Messages

This page enables existing Saved Messages to be edited. To do so, simply select the name of the Saved Message you wish to edit. This page also enables the creation of new Messages and the scheduling of a broadcast to an existing Saved Message by selecting the appropriate link.