Texting User Guide

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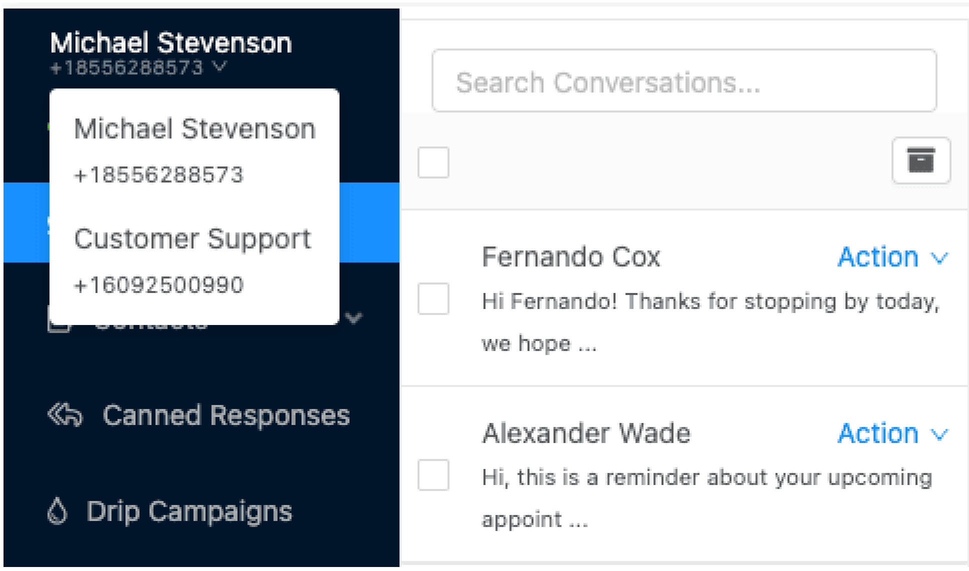
Switching Numbers

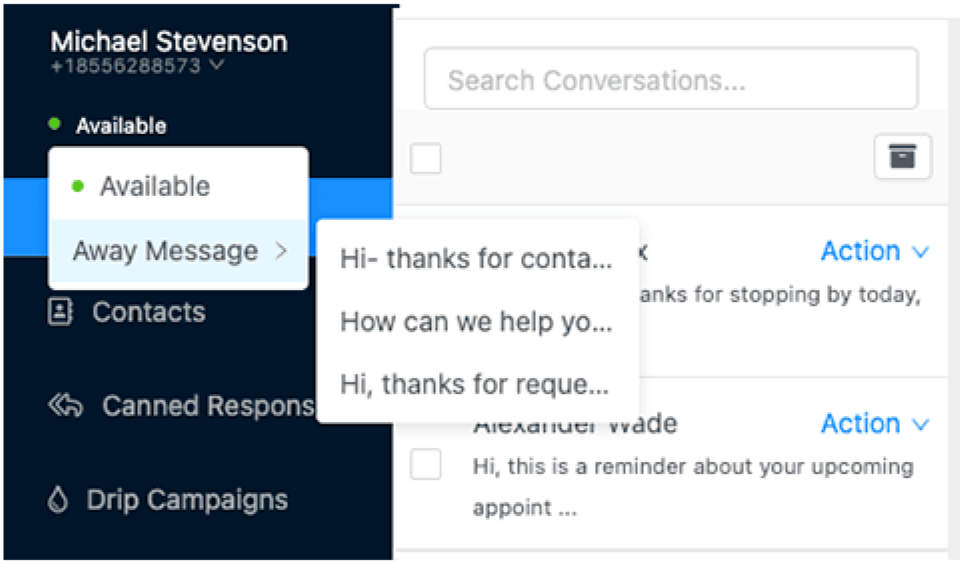
To switch active numbers, simply click on the number switcher at the top left of the screen and select a number from the dropdown. The application will reload the current page content, according to the number that you selected.



Note: Some users and account types may be limited to a single number.

Away Message

Away messages act as auto-responders to inbound messages. When an away message is active and a message is received, the contact which sent the message will receive an automatic reply containing the away message as the body of the message.



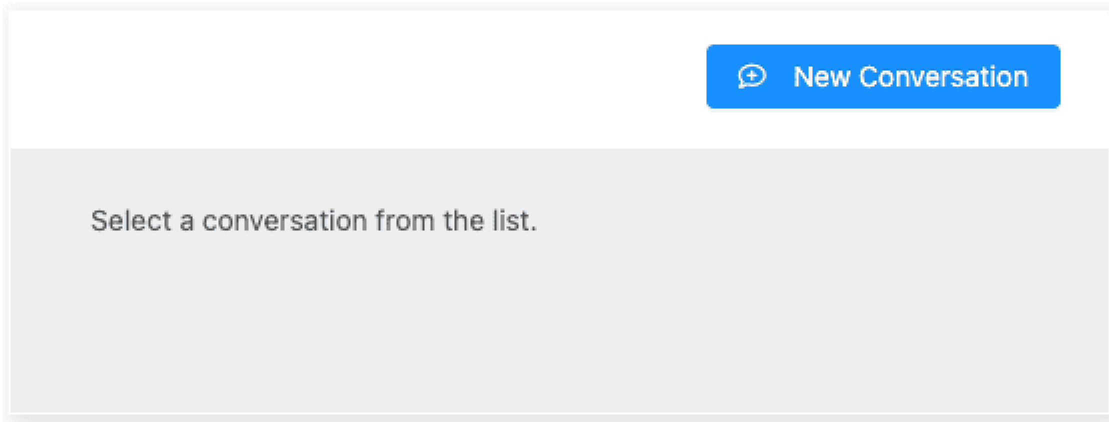
Setting an Away Message

Away messages utilize the Canned Response library as a source of messages to choose from. In order to set an away message, you must create at least one canned response. Once you have created a canned response, simply hover on the "Available" status indicator to display a list of canned responses to choose from.

Conversations

Starting a new conversation

1. Click "new conversation" from the top right of the app
2. Next choose to send a phone number or select a contact from your address book
3. Write your text



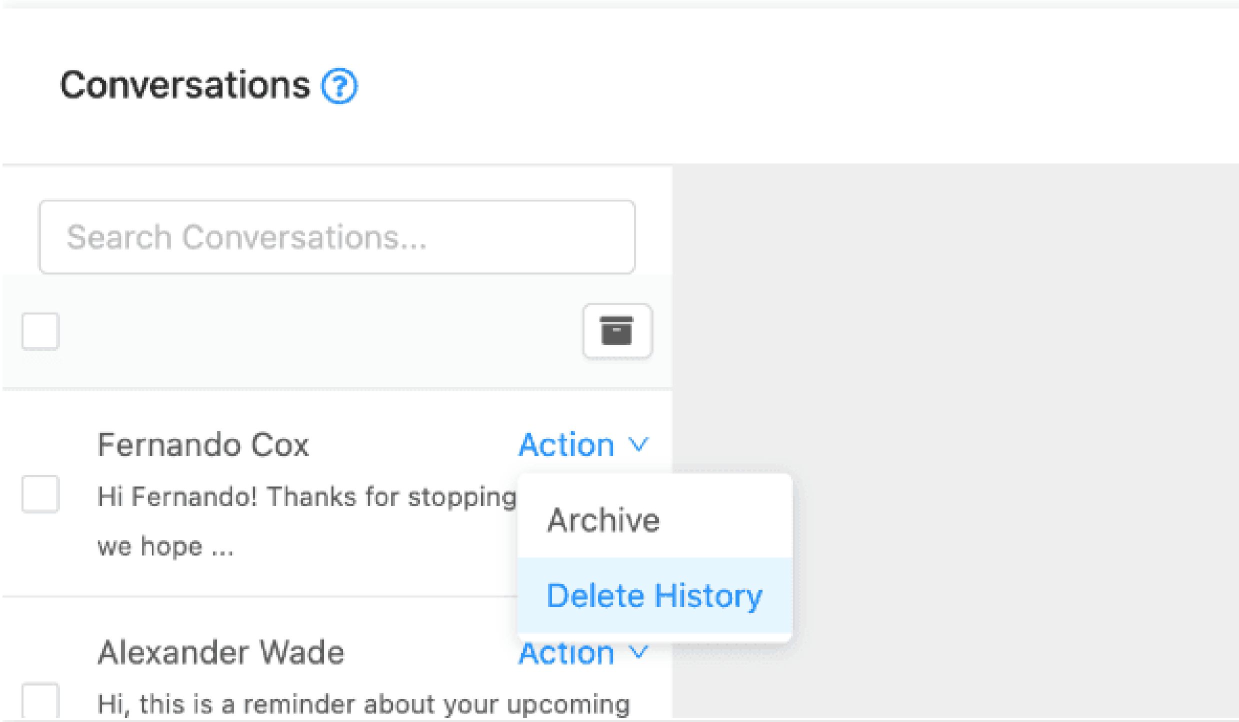
Each contact has an opt-in status, which defaults to "opted-in." The opt-in status of a contact controls the ability to use automated features of the application including but not limited to:

- Blasts & Contact Lists
- Drip Campaigns
- Reminders

A contact is opted-out when any one of the following keywords are received: STOP, END, QUIT, CANCEL, UNSUBSCRIBE, OPTOUT

Conversely, a contact is opted-in when any of the following keywords are received: START, UNSTOP, SUBSCRIBE, OPTIN

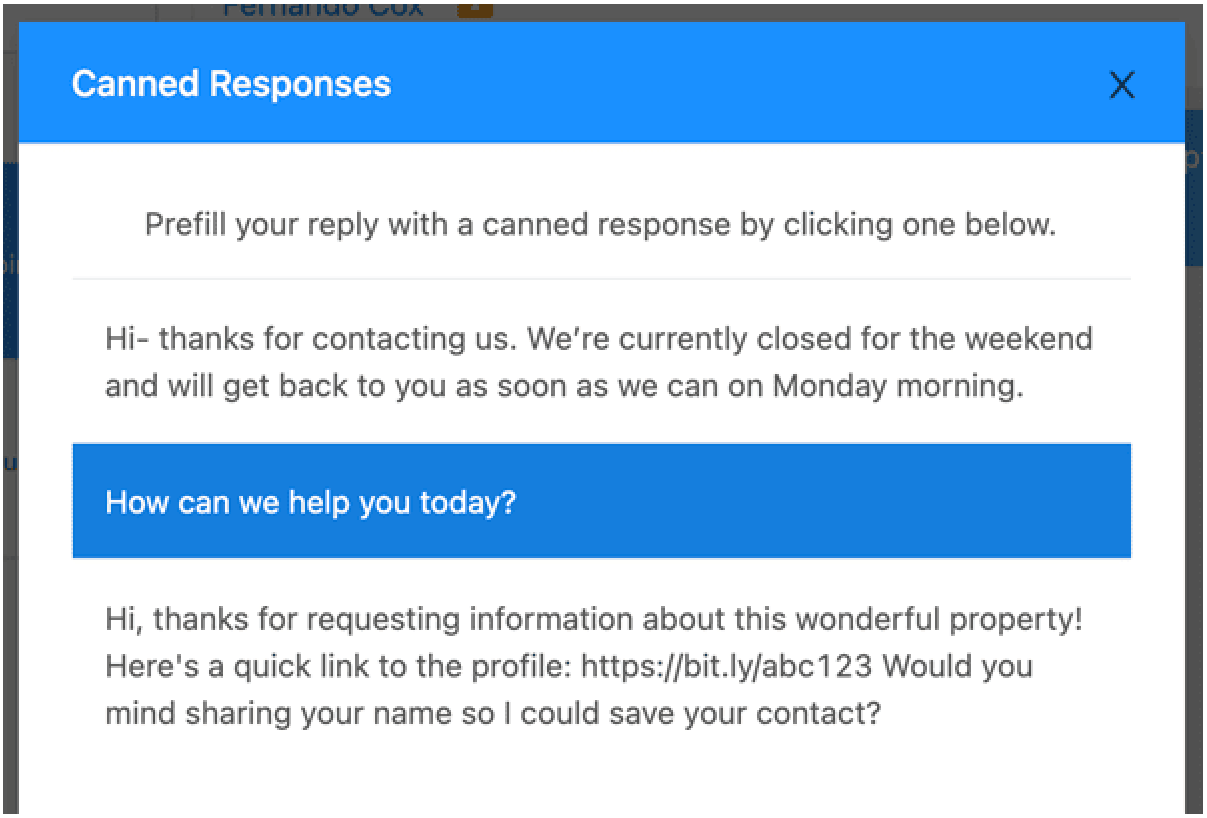
Delete or Archive Conversations



You can delete or archive individual conversations by choosing the "Action" dropdown, and choosing the "archive" or "Delete" option. If you choose to "delete history", you will be asked to confirm deletion of message history. This will delete all messages for this conversation and this action is NOT reversible.

Send Canned Response

Canned responses are pre-written messages that you can use as replies to common inquiries, as away messages, and as automatic replies to keywords.



1. **To send a canned response,** choose the double arrow icon in the message composer to launch the selection mode.
2. Select a canned response from the list to prepopulate the message textarea with the canned response. Canned responses are NOT automatically sent to allow you the opportunity to edit the message prior to sending.
3. Click Send (or hit Shift-Enter, when focused on the textarea)

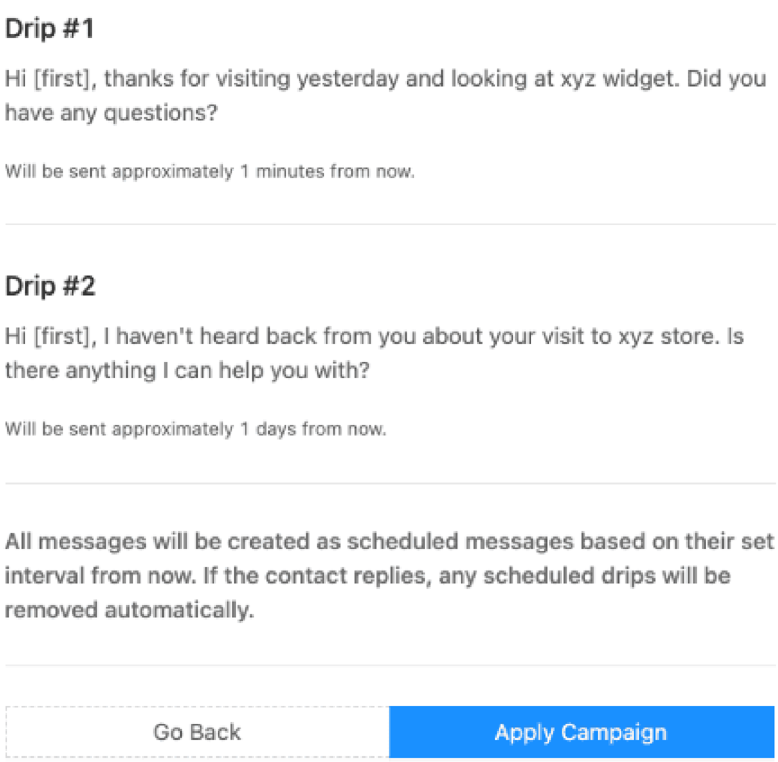
Apply Drip Campaign

Drip campaigns are a set of scheduled messages that can be used to gain your contacts attention and engage them in conversation. When applied, they are automatically scheduled consecutively based on their interval from the time of application.

Example: You would like to apply a drip campaign that has a total of three messages. Drip 1 has an interval of 1 day, Drip 2 has an interval of 3 days and Drip 3 has an interval of 5 days. When you apply that campaign to a contact, the first message will be scheduled for 1 day from now. The second message will be scheduled for 3 days from now and the third would be scheduled 5 days from now.

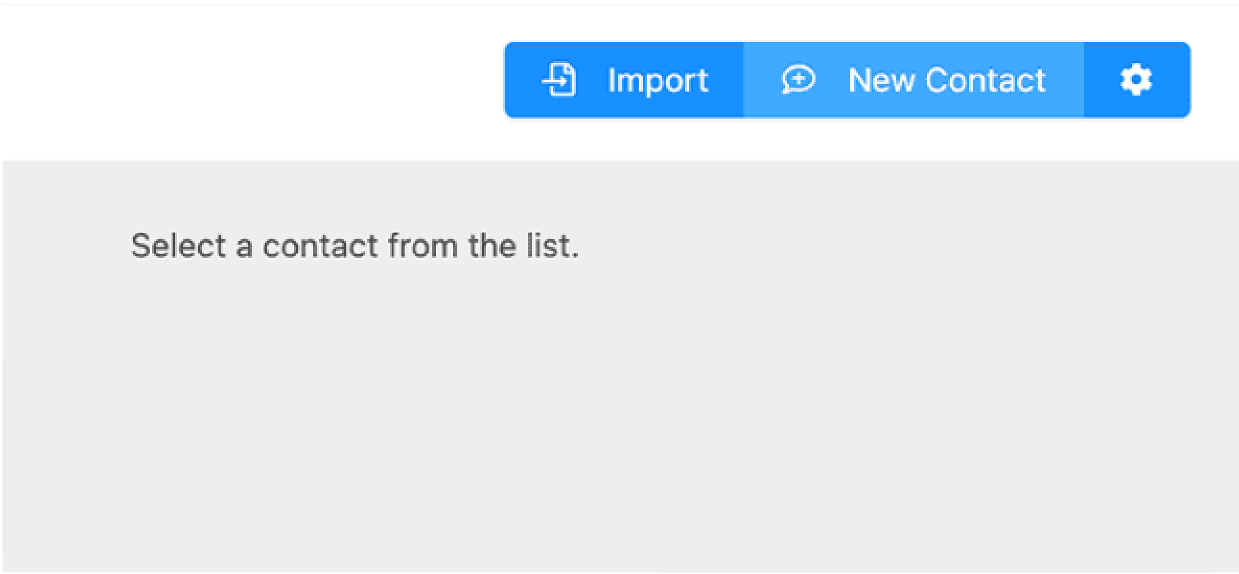
Drip messages will be sent until a reply has been received by the contact. If a message is received from the contact before any scheduled drip messages have been sent, any that are unsent will be automatically deleted.

1. **To apply a drip campaign to a contact,** choose the water droplet icon from the message composer area to launch the drip campaign modal.
2. Choose a campaign from the list and a preview of the campaign will be displayed.
3. Click "Apply Campaign" to initiate the drip campaign sequence.



Contacts

Adding a Contact



1. Click "New Contact" from the top right of the app.
2. Next, enter in details, being sure to complete all required fields, denoted by a red asterisk.
3. When all required fields are complete, click "Add Contact"

Editing a Contact

1. Choose the contact that you would like to edit from the list on the left.
2. Next, edit any details, being sure to complete all required fields, denoted by a red asterisk.

Note: Although the app does not utilize the e-mail address for communication, the e-mail address field is helpful when utilizing features like Relay Webhooks and the API as a secondary identifier field for integrations.

3. When all required fields are complete, click "Update Contact Details"

Note: Choosing to edit the "Opted out" checkbox manually will permanently opt this contact out, until the contact replies back with START, UNSTOP, OPTIN, or SUBSCRIBE.

Deleting a Contact

1. Locate the contact from the contact list on the left.

2. Next, choose the "Action" dropdown for that contact.
3. Finally, choose the "Delete" option to be prompted with a confirmation that you would like to delete the contact.

Note: Some users and account types may have the delete feature disabled by their administrator.

Importing Contacts via CSV

Importing allows you to load contacts from a CSV file into your account, optionally allowing you to segment your contacts into specific lists while uploading.

1. Click "Import" from the top right of the app.

Note: We provide a sample CSV that is pre-formatted for you to fill in your data. Please make sure that your CSV files match the format before uploading. Improperly formatted CSVs, will result in the entire import failing.

2. Choose the "Upload File" option or optionally paste in the content of your CSV.

Note: If you included a header row (e.g. "Full Name, Phone, Email") you may choose the "Skip First Line" checkbox to intentionally skip the first row of the list.

Note: If you would like to import these contacts into a specific list for marketing purposes, you can choose the list from the "Import Contacts into Selected List" dropdown. If the dropdown does not display, you should double check that at least one list exists in your "Lists" page.

3. Click "Import Contacts". The list will be sent to the server for processing. Depending on the list size, you should notice the contacts in your contact list within several minutes.

Deleting All Contacts

There may be a time where you need to delete all contacts for a user, like when reassigning a number or after an import of invalid or unintentional contact data.

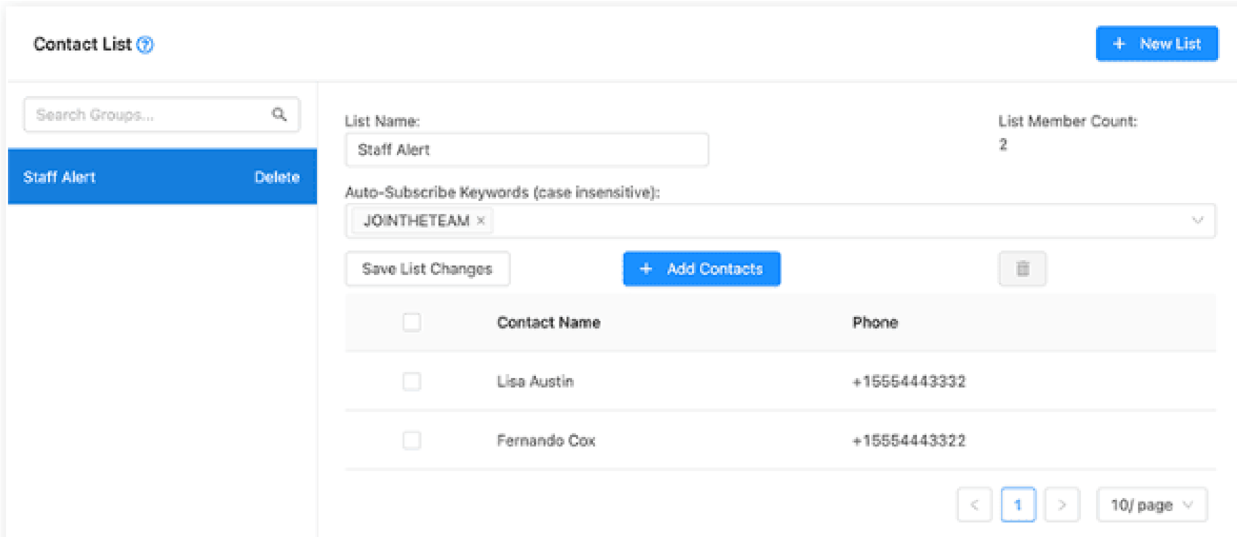
1. **To delete all contacts,** select the gear icon on the top right of the **Contacts** page to open the Settings modal.
2. Choose the "Delete" button and you will be prompted to confirm that you would like to delete all contacts. **This option CANNOT BE UNDONE.**

Depending on the size of your contact list, this process may take several minutes and your contact list may refresh several times as it syncs with the server.

Note: Some users and account types may have the delete contacts feature disabled by their administrator.

Contact Lists

Contact lists allow you to segment your contacts when sending Blasts.



Note: Some users and account types may have this feature disabled by their administrator.

Create a List

1. Click "New List" button on the top right of the screen.

2. Enter a name for the list and click "Add List"

3. After making any changes, be sure to click "Save List Changes"

Edit a List

1. Locate the list that you would like to edit on the left hand side.

2. Click the list to view the edit details view.

Tip: List name is meant to be a user-friendly identifier. (e.g. "Staff Alert" or "September Promo")

Auto-Subscribe Keywords

A great way to build lists is to promote a subscription keyword to your contacts. When an Auto-Subscribe Keyword is received from a contact, that contact will be automatically added to the contact list.

Tip: To generate an auto-reply to a contact subscribing to the list via keyword, utilize the "Auto-Reply Keyword" on the **Canned Response** feature, setting the keyword to the same as your list subscription keyword.

Add Contacts to a List

You can manually add a contact to a list by:

1. Identify and view / edit the list.
2. Click "Add Contacts" to open the contact selection drawer.
3. Check the checkbox next to any contacts that you want to add to the list.
4. Click "Add Contacts"

Remove Contact from a List

1. Choose the list that you would like to edit.
2. Click the checkbox on the row that contains the contact(s) you would like to delete.
3. Click the trash can icon to delete the selected contacts from the list.

Delete a List

To delete a contact list, simply locate the list you would like to delete and choose the "Delete" link on the right. You will be prompted to confirm deletion.

Blocked Senders

This section allows you to manage senders that you have previously blocked.

Blocking a contact will not delete the contact or previous messages, but will cause the contact to remain hidden at all times.

Inbound messages from a blocked sender will not be stored and are therefore impossible to view.

Note: Blocked messages are still subject to your provider's standard message rate.

Blocking Contacts

To block a contact from the conversation view, follow these steps:

1. Open the conversation view with the contact you want to block.

2. Click on the "Block" button.
3. The contact will now be added to your blocked senders list.

Blocking Contacts from Address Book

To block a contact from the address book, follow these steps:

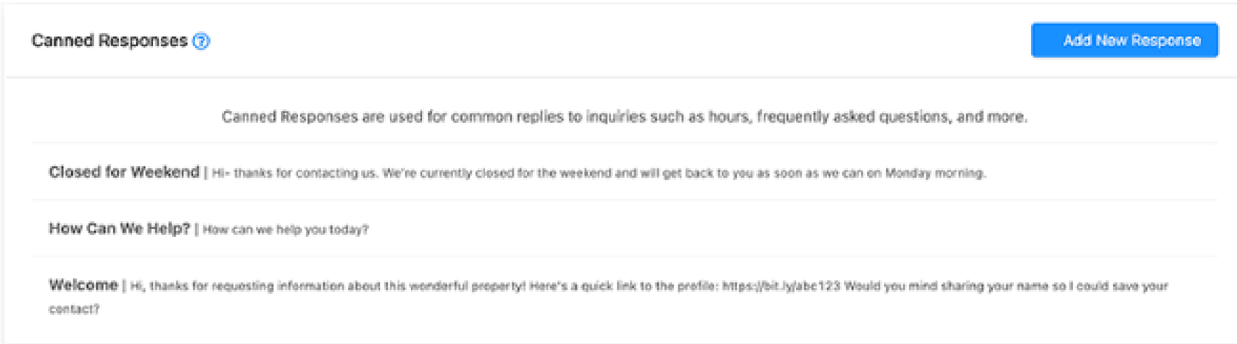
1. Go to the address book section.
2. Locate the contact you want to block.
3. Click on the contact's information or profile.
4. Click on the "Block" button.
5. The contact will now be added to your blocked senders list.

Blocking Phone Numbers

To block a phone number from the "My Profile - Blocked Senders" page, follow these steps:

1. Go to the "My Profile" section.
2. Navigate to the "Blocked Senders" page.
3. Locate the option to block phone numbers.
4. Enter the phone number you want to block.
5. Click on the "Block" button.
6. The phone number will now be added to your blocked senders list.

Canned Response



Creating / Editing a Canned Response

1. **To create a canned response,** click the "Add New Response" button on the top right of the screen. **To edit a canned response,** click on the canned response that you would like to edit from the list to open the edit drawer.

2. Add or modify the canned response details, being sure to complete all required fields, as denoted by a red asterisk.

3. **Note:** You may optionally enter a keyword into the "Auto-Reply to Keyword" field and when a message containing that exact keyword is received, a message will be sent back to the contact with the "Message Body" field as it's content.

4. Click "Add / Edit Canned Response" to save.

Deleting a Canned Response

1. Click on the canned response that you would like to delete from the list to open the edit drawer.

2. Click the "Delete Response" button at the bottom of the drawer. You will be prompted to confirm deletion of the canned response.

3. Click "OK" to confirm deletion.

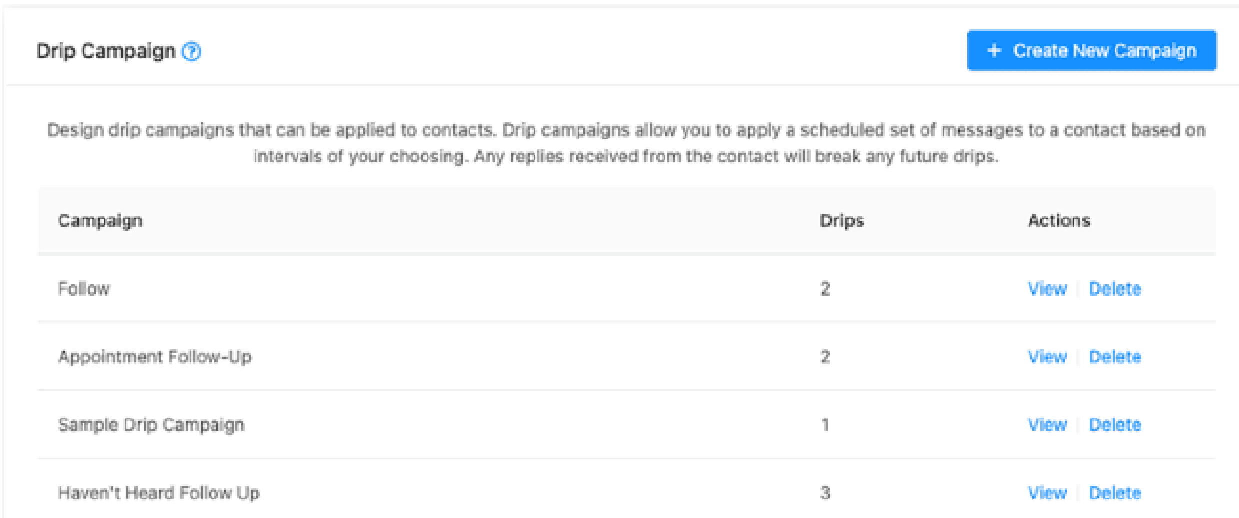
Setting a Canned Response as an Away Message

1. Create a new Canned Response or click to edit an existing one.

2. Click the "Is Away Message" switch under message body. Setting it to the right and turning it to blue will allow the canned response to show up in the away messages. The left side removes the response as an away message.

3. On the list view of canned messages. A message icon is visible stating the response is available as a message.

Drip Campaign



Creating / Editing a Drip Campaign

To create a new drip campaign, click the "Create New Campaign" button on the top right of the screen.

To edit an existing drip campaign, locate the drip campaign that you would like to edit from the list and click the "View" link under the "Actions" column to open the edit drawer.

Tip: We recommend setting the campaign name to something that will easily allow you to identify the campaign and it's contents when applying the campaign.

To add a drip to a campaign, click the "Add Drips" button to add a row. Enter the drip campaign message into the textarea and then select your drip campaigns interval, calculating it from time of application.

Tip: We recommend that you allow at least one day in between each drip interval to prevent your contact from becoming annoyed and opting-out of your message.

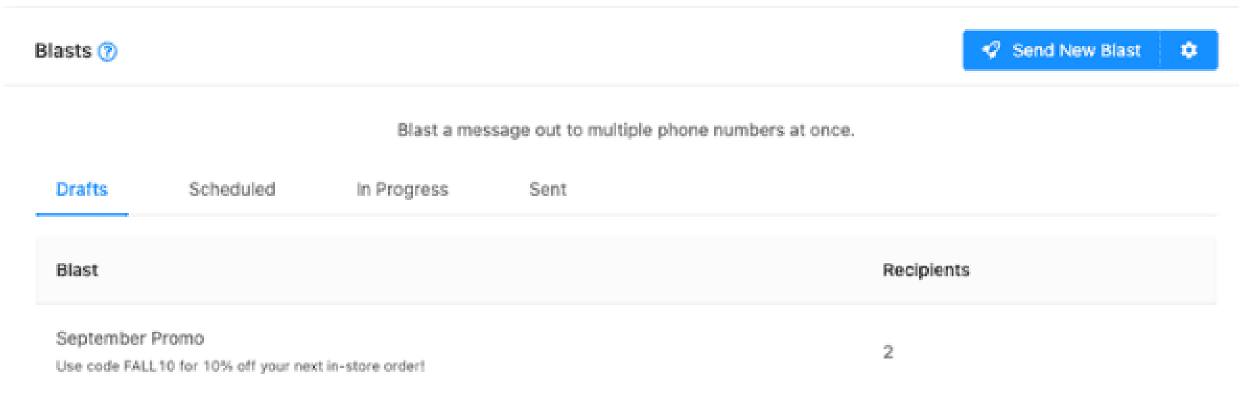
When you are done editing the campaign and individual drips, remember to click the "Save" button on the bottom right of the drawer to save your changes.

Deleting a Drip Campaign

1. Locate the drip campaign that you would like to delete from the list.
2. Click the "Delete" link under the "Actions" column. You will be prompted to confirm deletion of the campaign.
3. Click "OK" to confirm deletion.

Blast Texts

Blasts are a great way to send the same message out to a list of contacts, often used for marketing, staff alerts and organization notification systems.



Creating / Editing a Blast

1. Click "Send New Blast" button on the top right of the screen.
2. Complete all required fields, as denoted by a red asterisk.

Blast Status

Draft- This will save the blast in a draft state, allowing you to come back and edit it before sending or scheduling in the future.
Send Now- This will queue the blast up to be sent in the next several minutes.
Schedule- This option will allow you to choose a timezone, date and time to send the blast.

Compliance Footer
The Compliance Footer will automatically be appended to the message body. It is recommended that your compliance footer includes identifying information about the sender, a brief explanation as to why you are contacting them (e.g. to discuss order details, appointments, etc.), and how they can

opt-out from receiving future communications (e.g. Reply STOP to unsubscribe.).

3. Click "Save Blast" to save or schedule your blast.

Note: We currently utilize a simple time-based queueing system to send out blasts. Users and account types have varying limitations on the volume at which they can send / accept messages in bulk. If you experience deliverability issues with blasts, please consider your carrier limitations and plan your blasts accordingly.

Deleting a Blast

1. You can delete blasts that are in Draft or Scheduled status. First, select blast that you would like to delete from either the Draft of Scheduled tab.

2. Next, scroll to the bottom of the edit blast drawer. Click "Delete Blast" to open the confirmation prompt.

3. Click "OK" to confirm deletion of the blast.

Best Practices

- You should always obtain proper opt-in before sending out marketing campaigns to contacts.

- Identifying your brand and an opt-out option in the compliance footer helps to build trust with your recipients.

- Be mindful of the length and content of your message.

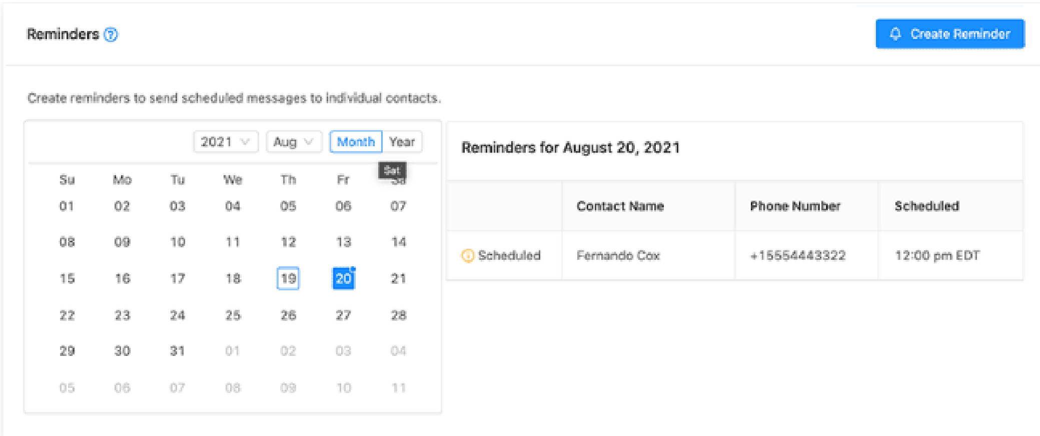
- Avoid content that might be considered spammy.

- Try to avoid using URL shorteners as receiving carriers often block links from popular services like bit.ly or goo.gl.

- When sending a high volume of messages, it is recommended that you register a campaign and brand with The Campaign Registry (https://www.campaignregistry.com/) for the best deliverability.

- Do not send messages related to S.H.A.F.T. (Sex, Hate, Alcohol, Firearms, Tobacco--including cannabis)

Reminders



Tip:
Dates that have messages scheduled have a blue dot identifier above the day number.

Creating a Reminder

1. Choose the date on the calendar for which you would like to schedule the reminder.
2. Click "Create Reminder"
3. Select a contact as a recipient.
4. Select a timezone and time at which to send the message.
5. Enter your message.
6. Click "Save"

Editing a Reminder

1. Choose the date on the calendar for which the reminder is scheduled for. This will pull up a list of reminders for that date on the right hand side.
2. Click the reminder that you would like to edit.
3. Edit the desired fields.
4. Click "Update"

Note Reminders can be edited or deleted up until their scheduled date / time.

Deleting a Reminder

1. Choose the date on the calendar for which the reminder is scheduled for. This will pull up a list of reminders for that date on the right hand side.
2. Click the reminder that you would like to edit.
3. Click the "Delete" button to open the confirmation prompt.
4. Click "OK" to confirm deletion.