

SMS Express

SMS From Excel Add-In

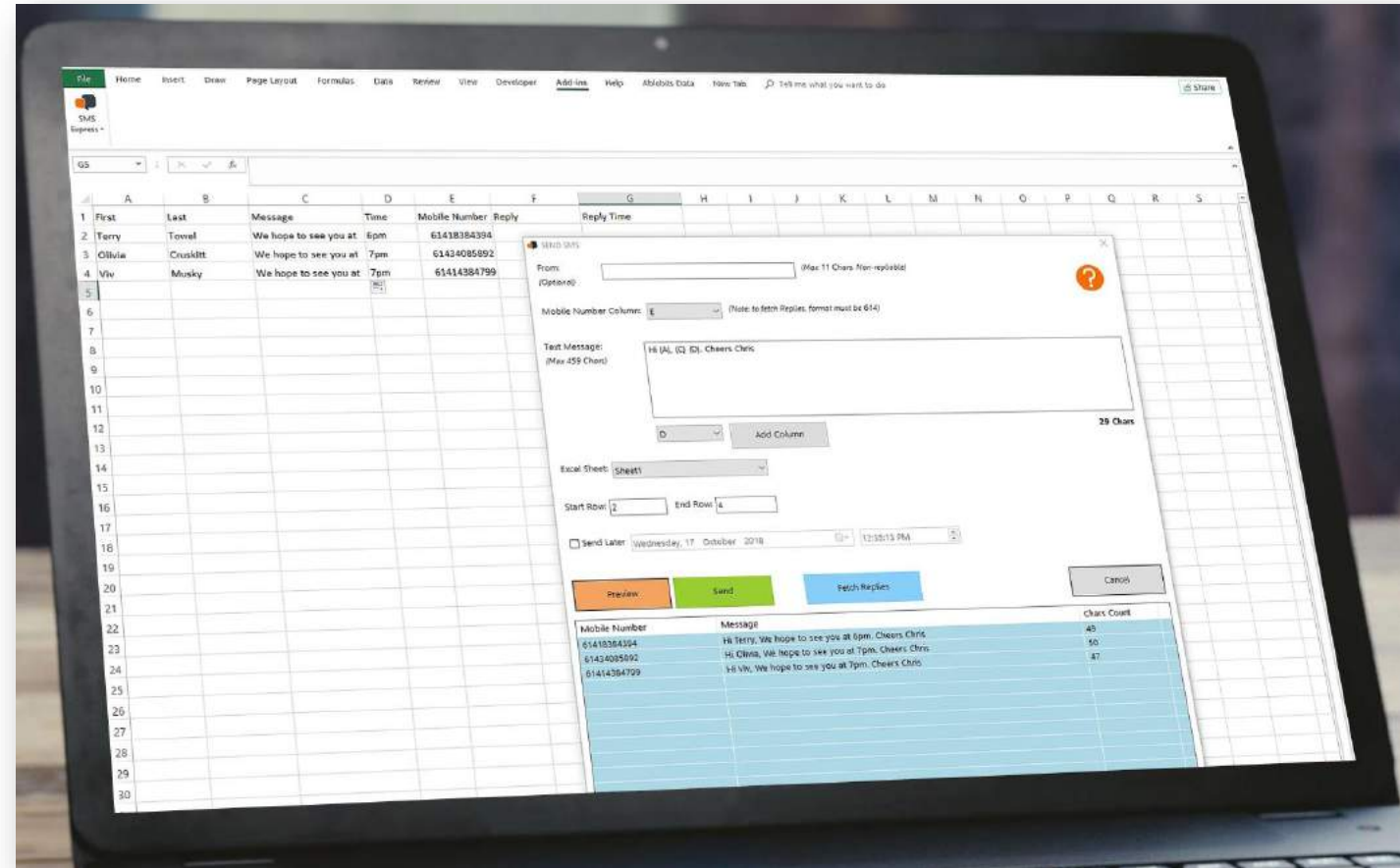
User Guide

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Requirements:

- Windows
- Excel 2016+
- Internet connection
- Account with SMS Express (Username + Password)
- Enough credits to send SMS



Our SMS From Excel add-in allows you to send text messages directly from Excel using your SMS Express account credentials and credits.

You login via the software **inside** your Excel spreadsheet, instead of logging in to the platform via a browser.

No need to visit the online platform control panel (cp.smsexpress.com.au), unless you need to top-up your credits or view detailed delivery reports, or check your **Blacklist** (more on this page 10)

Note this is Windows software and cannot run on a Mac.



1

The software installer package is self-contained. After downloading the setup file, simply double click to RUN the installer.

The software will only install if it is on your PC such as your computer's C-Drive or Downloads or Desktop or another local folder. If the software is on Google Drive, OneDrive or any external link, you will get an error saying that the software cannot be found. Simply download it to your PC and run the install package again.

If you get any warnings from Windows, it is safe to run this software. Click **More Info** then **Run Anyway** button. This will allow Windows to install the add-in

2

After the add-in has run, **open** an Excel document (a blank one is fine) and look for Add-ins.

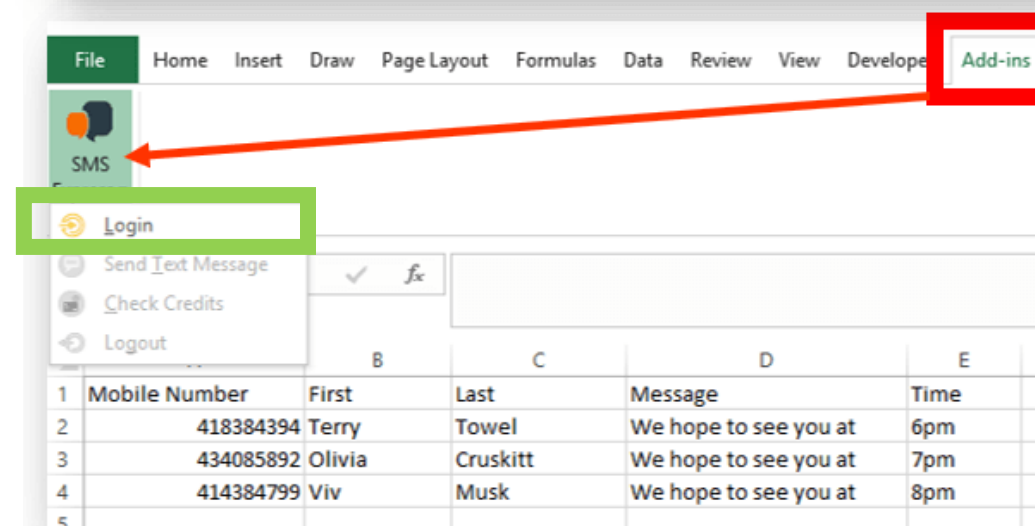
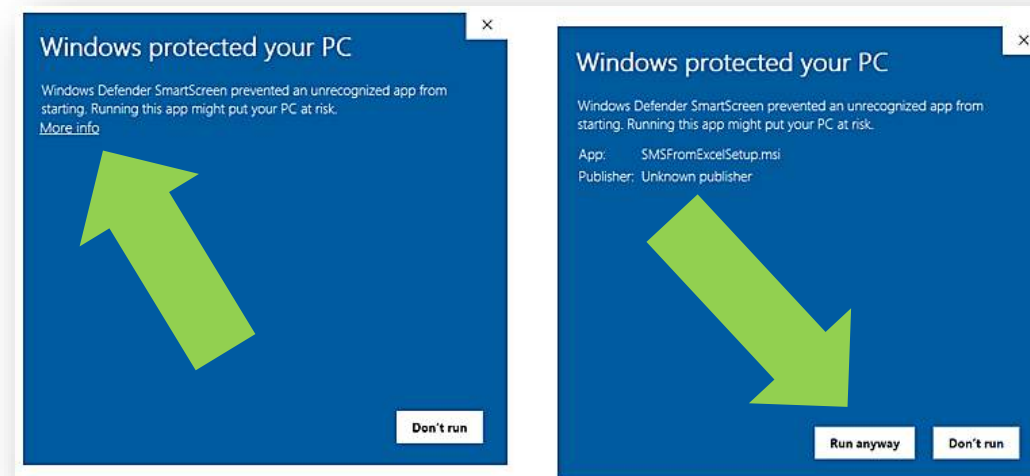
3

Click the logo button, then **login** with your SMS Express Username & Password.

If the logo is not there, you may have to add in manually. See Troubleshooting (page 9)



TIP: Right click the logo and Add To Quick Access Toolbar





- You can quickly check your current **credits** balance from the add-in. If you need more credits, simply login to the **online platform**, click **Online Payments** to purchase credits. Credits are 7.73c PLUS GST (8.5c INC GST).

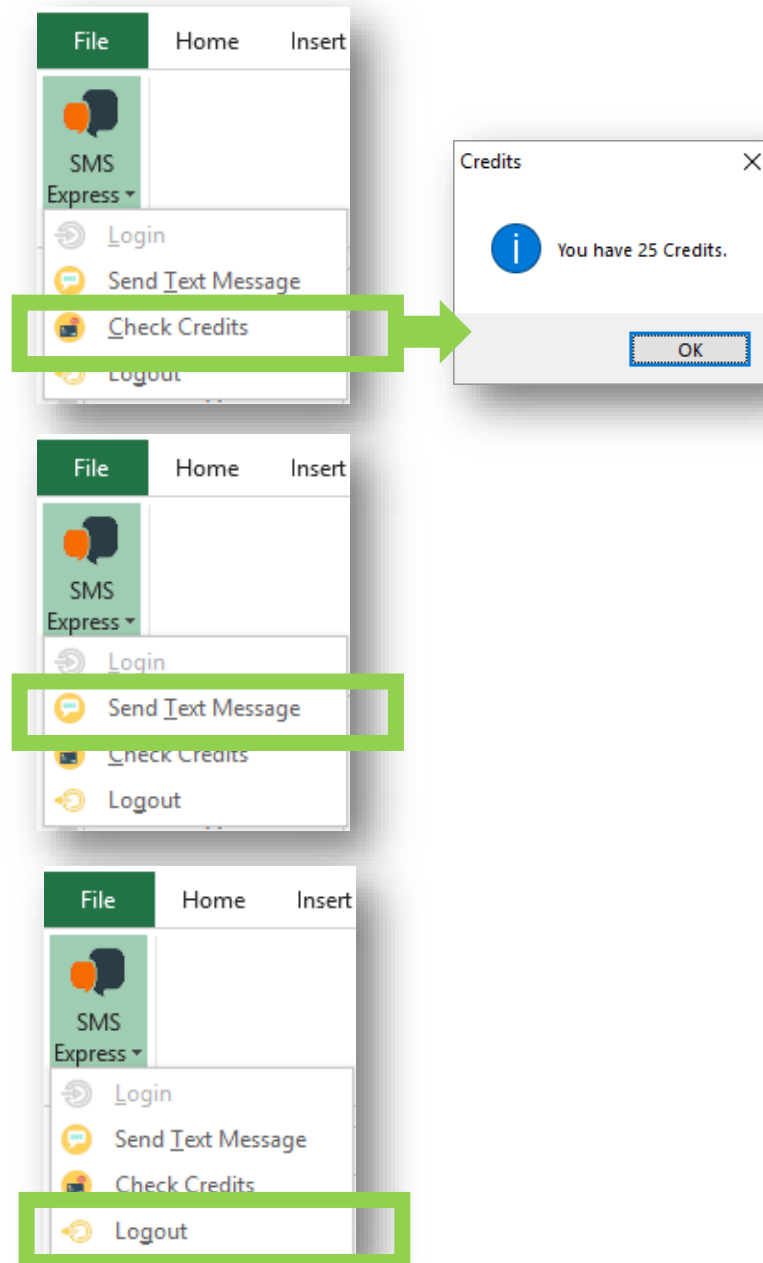
There's no minimum order. Buy as little or as many as you need. Credits go straight into your account. Or if you're on a corporate account, email us a purchase order, or call 1300 668 217 (all cards accepted).

- To get started with your messaging, click **Send Text Message**.

This opens the Messaging window on top of your spreadsheet (more on this next page).

- When you are finished it's a good idea to always **Logout**. Otherwise, anybody can use your PC and Excel spreadsheet to send SMS from your account!

Now let's dive right in and see how it all works...



Functions



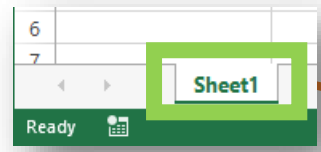
Where are your mobile numbers?

Select the column. This software allows numbers to be in **any** column.

NOTE: the numbers can be 04XX or 614XX or 4XX. **But for Replies, they must be in 614**

For adding dynamic fields from your selected **Columns** for personalisation

If you have multiple worksheets in your Excel file, select which **sheet** contains your data.



Optional scheduling.

IMPORTANT: once you have scheduled it cannot be cancelled so double check before you Send.

Preview before sending.

If you change the message, simply click Preview again to refresh

OPTIONAL. Change who the SMS comes **FROM** (called *Sender ID* similar to *Caller ID*). **Leave blank if you want Replies.** More info on page 7

Goes to **Help Centre** on smsexpress.com.au website

SEND SMS

From: (Max 11 Chars. Non-repliable)
(Optional)

Mobile Number Column: (Note: to fetch Replies, format must be 614)

Text Message: (Max 459 Chars)

0 Chars

Excel Sheet:

Start Row: End Row:

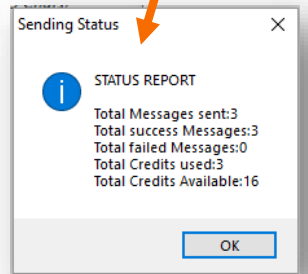
Send Later

Mobile Number	Message	Chars Count

Character counter.
160 characters = 1 standard SMS = 1 credit.
You can send up to 459 characters = 3 joined messages = 3 credits

This box appears after your SMS is sent.

NOTE: you can view detailed **Delivery Reports** in your **online** account. **Login** to your **account** at: cp.smsexpress.com.au and select **Date Range Report**.



Select **rows** range you want the SMS sent to. Our example is **Row 2 to Row 4.**

	A						G	H
1	First	Last	Message	Time	Day	Mobile Number	Reply	Reply Time
2	Terry	Towel	Can you start work at	2pm	Wednesday	614183843	Yes, sure	16/10/2018 2:57
3	Olivia	Cruskitt	Can you start work at	4pm	Thursday	614340858	No sorry. I'm busy	16/10/2018 2:57
4	Viv	Musky	Can you start work at	8am	Friday	614143847	Yes	16/10/2018 2:57

This will insert 2 columns next to the mobile number column with the **Reply** & timestamp. Replies will only work when numbers are in **614 format** and you don't change the **FROM** SenderID.

Click again to receive any updated Replies. New replies will update the Reply & Timestamp columns.



Mobile Number	Last	Message	Time
61418384394	erry	Towel	6pm
61434085892	ivia	Cruskitt	7pm
61414384799	v	Musky	8pm

If you want to blast out a quick SMS:

1. Type in your message
2. Select your Rows
3. Preview
4. Send.

Done.

For a fancier SMS, see the next page...

SEND SMS

From: (Max 11 Chars. Non-repliable) ?

Mobile Number Column: (Note: to fetch Replies, format must be 614)

Text Message: (Max 459 Chars)

1 Enter your message in this box

54 Chars

Excel Sheet:

2 Start Row: End Row:

Send Later

3 Preview **4** Send

Mobile Number	Message	Chars Count
61418384394	You can enter a simple message with no personalisation	54
61434085892	You can enter a simple message with no personalisation	54
61414384799	You can enter a simple message with no personalisation	54

Personalised SMS

You can use the **Add Column** or type the **Columns** in manually using your keyboard.

Make sure you use the curly brackets **{}**.

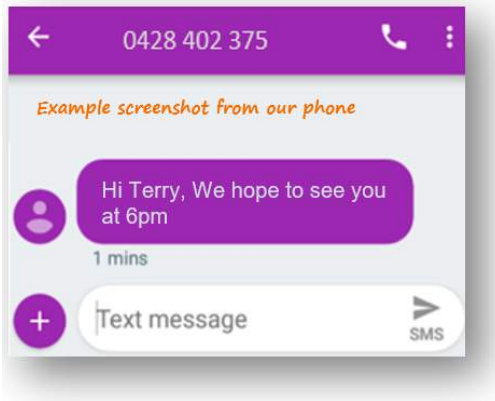
For example if I didn't need their Last name I could type: **Hi {A}, {C} {D}**

This would read:

Hi Terry, We hope to see you at 6pm

Hi Olivia, We hope to see you at 7pm

Hi Viv, We hope to see you at 7pm



First	Last	Message	Time	Mobile Number	Reply	Reply Time
Terry	Towel	We hope to see you at	6pm	61418384394		
Olivia	Cruskitt	We hope to see you at	7pm	61434085892		
Viv	Musky	We hope to see you at	7pm	61414384799		

SEND SMS

From: (Optional) (Max 11 Chars. Non-repliable)

Mobile Number Column: E (Note: to fetch Replies, format must be 614)

Text Message: (Max 459 Chars) Hi {A}, {C} {D} 16 Chars

Excel Sheet: Sheet1

Start Row: 2 End Row: 4

Send Later Wednesday, 17 October 2018 12:29:21 PM

Preview Send Fetch Replies Cancel

Mobile Number	Message	Chars Count
61418384394	Hi Terry, We hope to see you at 6pm	35
61434085892	Hi Olivia, We hope to see you at 7pm	36
61414384799	Hi Viv, We hope to see you at 7pm	33

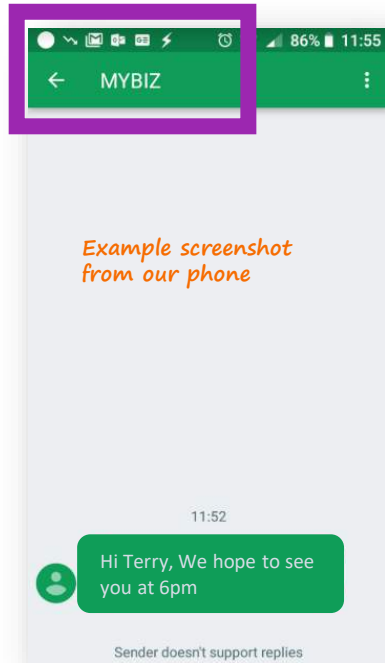
Custom Sender ID

The **Sender ID** can be your business name (maximum 11 characters) or perhaps your mobile number.

If you leave **blank**, the SMS will be from one of our virtual numbers. This is the **Repliable** setting.

Note if you use a **word Sender ID**, like your business name, **you cannot get replies.**

If you use your **own mobile number** replies will come **back to your phone.**



First	Last	Message	Time	Mobile Number	Reply	Reply Time
Terry	Towel	We hope to see you at	6pm	61418384394		
Olivia	Cruskitt	We hope to see you at	7pm	61434085892		
Viv	Musky	We hope to see you at	7pm	61414384799		

Mobile Number	Message	Chars Count
61418384394	Hi Terry, We hope to see you at 6pm	35
61434085892	Hi Olivia, We hope to see you at 7pm	36
61414384799	Hi Viv, We hope to see you at 7pm	33

Troubleshooting



The Windows installer containing the add-in software usually installs itself into your PC's **C: drive** and into the **Program Files(x86) folder**. Then adds it into Excel for you. But some systems can be fusspots (especially on some servers).

Here's how to manually add the **add-in** to your Excel spreadsheet:



TIP: If you still have issues, please consult your IT person as your server may have special permissions running, which we cannot assist with.

Note this is Windows software and cannot run on a Mac.

1 Options

2 Add-ins

3 Manage: COM Add-ins

4 OK

Should end up here

Mobile Number	First	Last	Message	Time
418384394	Terry	Towel	We hope to see you at	6pm
434085892	Olivia	Cruskitt	We hope to see you at	7pm
414384799	Viv	Musk	We hope to see you at	8pm

Dealing With Optouts/Blacklist

When you send Bulk SMS from the SMS Express **online platform** (not from the Excel add-in), the **platform** can automatically **unsubscribe** people who reply with certain **keywords** like:

STOP UNSUBSCRIBE OPTOUT REMOVE F*** OFF CANCEL

Optouts automatically go into the **Blacklist**, and you can't send Bulk SMS *from the platform* to them.

Similarly, if you send a SMS **from the Excel add-in**, any optouts will be also added to your **Blacklist**.

BUT when sending SMS from the **Excel add-in**, it **will ignore the Blacklist**.

Regularly check the **Blacklist** and remove/suppress optout numbers from your Excel spreadsheet. Also, you can **tell the platform to email** you when you get an optout.

Do this in **Account Settings**:



"Opt Out" Email Notification:
Receive email when "opt out" received True
Email

NOTE: If you use a custom Sender ID from the Excel add-in (or the online platform), people cannot reply. If you are selling something, or people want to stop getting your SMS, you must allow them to optout somehow. We recommend including your business phone number or website in the text, and remove or suppress the optout numbers from your list. You don't want to get into hot water by breaching the Spam Act. Nasty fines!

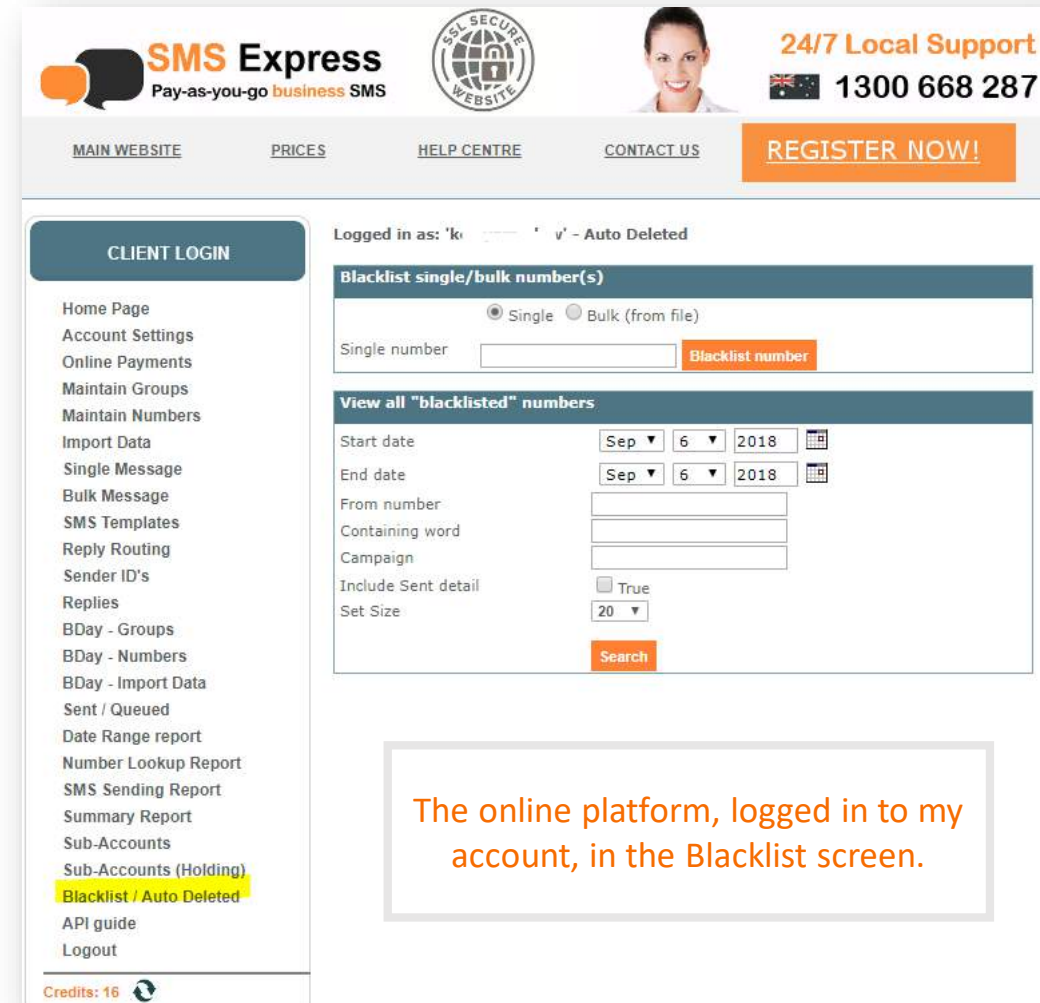
NOTE: If you regularly send reminders or staff texts, and you switch between the Excel add-in and the online platform, and they complain of NOT receiving your SMS, keep an eye on the **Blacklist** in case your staff or customers **accidentally opt themselves out**...it happens!

Some of our customers use the add-in for single or small broadcasts, but use the online platform for bigger broadcasts, and the accidental optouts are usually discovered then!

BAMBOOZLED?

We are **ALWAYS** here to help you.

Just call 1300 668 287 or info@smsexpress.com.au



The online platform, logged in to my account, in the Blacklist screen.