

Automated Birthday Messages & Annual SMS Reminders

Birthday Messages are sent to your contacts **automatically**. The **BDay** function is a module within the SMS platform that can send out annual text messages automatically. It's easy to setup. If you only have a few, you can create a **BDay – Groups** then **BDay - Import Data** and add them manually. Or create the B-Day Group, create and format your list on an Excel spreadsheet, and quickly import the list.

This information stays in the system until you change it. And you can add numbers or edit the numbers or names or dates in the Group/s any time you need to. The following information shows you how to import a list of birthdays, and how to add one by one.

First, Create & Format Your List

1. On your **PC**, open up Excel or similar program.
2. Add your list details into columns. Columns **A, B,C** are required and tells the system what Day and Month to send. The other columns (D-G) are optional Placeholder fields (4 merge fields) for personalising your message. You could to use these for inserting the First Names and other relevant info (more on this next page)

Column A = Mobile Number

Column B = Day

Column C = Month

Column D = Your choice = Value 1

Column E = Your Choice = Value 2

Column F = Your choice = Value 3

Column G = Your choice = Value 4

3. SAVE AS an Excel file (*.xls or .xlsx*) or a CSV file (*.csv*)

	A	B	C	D	E	F	G
1	0418384394	25	6	Kerryn	Marlow		
2	0434085892	2	2	John	Smith		
3	0414384799	7	5	Linda	Blair		
4	0431717028	11	8	Andy	Maher		
5							
6							
7							
8							

*in the next page we'll show you how to create your Group.
Please make sure you are logged in to your account....*



Create Group

1. Click the **BDay – Groups**
2. **Group Name** - Enter Group Name (*eg Client Birthdays*)
3. **Group Description** - Enter Group Description (*eg Kates List*)
4. **Group Message** – Type in a Group Message. You have the option to personalise each message using the **placeholder fields 'Value 1 - Value 4'**
Value 1 = Column D on your spreadsheet (*this is usually a first name and probably all you need to have*)
Value 2 = Column E on your spreadsheet
Value 3 = Column F on your spreadsheet
Value 4 = Column G on your spreadsheet
5. **Send Time** - Enter the time you would like messages to go out
6. If you are happy with the message on the **Preview**, click **Create Group** button

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Logged in as: 'kerrymarlow' - Maintain Groups

Create Group:

Group Name:

Group Description:

SenderId:

Value1 **Value2** **Value3** **Value4**

Group Message:

Preview: **Message:** (Characters used : 67)
Happy birthday @@value1@@! We hope you have a great day. ACME Corp

Send time: :

Replies:

Forward to email:

Create Group

Name	Description	Numbers
Test Bday	Test Bday	2 Download
Owner: kerrymarlow	Created: 15/Mar/2016 05:12:57	Time: 15:00
Message: Dear @@value1@@! happy bithday test message		EDIT

Delete Selected

You can also have any REPLIES to your SMS forwarded to your email address, so you don't have to login to your online account to check. This is FREE.

On the next page we'll show you how to import your list into your Group.

Tip: Your account's **Current Time** is set to Australian Eastern Standard Time (QLD time), which shows as **Server Time + 8 hours (480 minutes)**. **IMPORTANT:** It does not automatically adjust to Daylight Savings times or local time zones. If you are in a time zone such as NT WA or SA or NZ, you may want to adjust in **ACCOUNT SETTINGS** so it displays your local time.



Importing Your Birthday or Anniversary Lists

You have 2 Import options. If you have a handful of records, you can simply add these into the system manually instead of importing a spreadsheet. You can also add new records on the fly to an existing B-Day Group without using a spreadsheet.

The below image shows the Import section for B-Days, and you can see how these work..

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Credits: 45

Logged in as: 'kerrymarlow' - Import Bday data

Insert Single Number:

Insert into: **Test Bday (Numbers:2)**
* - Groups created by another user

Number:

Value 1:

Value 2:

Value 3:

Value 4:

Day: **1**

Month: **Jan**

Update if exists: Yes

Deleted: Dont import if number exists in **Auto Deleted**

Duplication: Ignore Check all my groups Check selected groups

All numbers imported into a group are unique.
This setting will allow you to import the number if the number exists in one of your other groups.

Import single number

Bulk Import:

Insert into: **Test Bday (Numbers:2)**
* - Groups created by another user

File to upload: **Choose File** No file chosen

File type: **Excel**

Update if exists: Yes

Deleted: Dont import if number exists in **Auto Deleted**

Duplication: Ignore Check all my groups Check selected groups

All numbers imported into a group are unique.
This setting will allow you to import the number if the number exists in one of your other groups.

Bulk import from file

Import Instructions:



Import A Single Number

This is handy if you want to quickly add a new number and name...here's how:

1. Click **BDay – Import Data – Insert Single Number**
2. **Select Group** to Insert the single number into
3. Fill out the rest of the details as per below example then click **Import Single Number**

Insert Single Number:

Insert into: Test Bday (Numbers:2) * - Groups created by another user

Number: 0418384394

Value 1: David

Value 2: Jones

Value 3:

Value 4:

Day: 12

Month: Jun

Update if exists: Yes

Deleted: Dont import if number exists in Auto Deleted

Duplication: Ignore Check all my groups Check selected groups

All numbers imported into a group are unique.
This setting will allow you to import the number if the number exists in one of your other groups.

Import single number

Data – Bulk Import

1. Click **BDay – Import Data – BULK IMPORT** (scroll down past Insert Single Number)
2. **Select Group** from Insert into
3. **Browse your PC for file to upload** (the list you created)
4. **Click Bulk import from file...and you're done!**

Bulk Import:

Insert into: Test Bday (Numbers:2) * - Groups created by another user

File to upload: Choose File No file chosen

File type: Excel

Update if exists: Yes

Deleted: Dont import if number exists in Auto Deleted

Duplication: Ignore Check all my groups Check selected groups

All numbers imported into a group are unique.
This setting will allow you to import the number if the number exists in one of your other groups.

Bulk import from file



How to View and Edit Existing Birthday/Anniversary Contacts

To view who is getting messages, edit/delete an existing record, or change the message or time sent, you can do this easily via **B-Day Numbers**. This is your “address book”.

To view the records, click the **Search Data** button and it will display a box with the records and an Edit option. (hint: ticking the “**Display ‘value’ fields in results**” then click **Search Data** button will show all the info associated with that record. Unticked will simply show Number Group Edit).

To view **upcoming** Birthday/Anniversary recipients simply search using your preferred Search Filters. The example below shows Birthday messages I have scheduled for March.....

This Search Filter box allows you to refine your search by Group Name or Values (placeholder fields), plus Day or Month. You can also SORT by Number, Month, day etc

The screenshot shows the 'Maintain Numbers' interface. At the top, it says 'Logged in as: kerrynmarlow - Maintain Numbers'. Below this is a 'Search Filter' section with the following fields: 'Group name' (All groups), 'Number', 'Value1', 'Value2', 'Value3', 'Value4', 'Day' (NA), 'Month' (Mar), 'Sort' (Number, ASC), and 'Set Size' (20). There is a 'Search Data' button. Below the search filters is a table of records. The table has columns for 'Number', 'Group', and 'Share'. The records are: 61418384394 (Kerryn, Test Bday, NA), 61477255066 (Katrina, Test Bday, NA). There are 'EDIT' buttons for each record. A 'Delete selected' button is also present. A blue callout box points to the 'EDIT' button for the first record, stating: 'You can also Edit the existing entry on the fly to change the name or Day or Month or phone number'. A red dashed arrow points from the 'Display' checkbox in the search filters to the 'EDIT' button. A blue callout box points to the 'Replies' menu item in the left sidebar, stating: 'This Search Filter box allows you to refine your search by Group Name or Values (placeholder fields), plus Day or Month. You can also SORT by Number, Month, day etc'. The left sidebar also shows 'BDay - Numbers' highlighted in yellow.

Number	Group	Share	
61418384394	Test Bday	NA	EDIT
Kerryn	Day:15	Month:3	
61477255066	Test Bday	NA	EDIT
Katrina	Day:15	Month:3	

How Do I Know They Were Sent?

These will show up in **Sent/Queued**, and you can **View** the Delivery Report

Replies

Don't forget to check your **Replies** regularly. You may have a client question or appointment waiting for a response! (note clients cannot reply if you use a word as a SenderID). You can also have replies sent to your email address (free). See **Create Group** earlier on page 2 for instructions.

If you need help with any of this, we are only a call or email away!

