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NOTE: For information on SMS From Excel Add-in, view the separate User Guide for this software:
<https://smsexpress.com.au/sms-from-excel.html>

Login

First go to your online (cloud) Control Panel www.cp.smsexpress.com.au and login with your username and password. The number of credits in your account are in **orange** in the bottom left navigation menu below Logout.

The process to sending a Bulk Message is a simple 3 steps: Create Group via Maintain Groups, Import Data, Bulk Message. The following info shows you how to do this, plus takes you through other functions in detail. Don't forget we also have how-to videos in our Help Centre.

Maintain Groups

Start here to create your Groups. These are your lists/ databases of your mobile numbers.

1. Enter **Group Name** and **Group Description**
2. **Sub-Accounts** – If you want to share that group with a *Sub- Account (more info on Sub-Accounts further on)*
3. Click on **Create Group**
4. Your Groups are displayed below. *Numbers* is the number of mobile phone numbers in the groups. Our sample *New Customers* Group in the image below has 0 because we still need to Import **Data** (details on this coming up in next section)
5. Group Name, Description, and Sub-Accounts can be edited (but not numbers) – Click *Edit* to open the edit box
6. Group can be deleted – Tick the box above Edit on the group you want to delete. Click *Delete Selected*
7. Group can be Exported to Excel – Click on the word *Download*

CLIENT LOGIN

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- Maintain Numbers
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- Bulk Message
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- BDay - Groups
- BDay - Numbers
- BDay - Import Data
- Sent / Queued
- Date Range report

Logged in as: [redacted] - Maintain Groups

Create Group:

What is a group?

Group Name:

Group Description:

Share group with Sub-Accounts:

Create Group

View: My groups Sub-accounts only My and my sub-accounts groups

Name	Description	Numbers
<u>Clients</u>	Clients	3 Download
Owner: kerrymarlow	Created: 28/Jan/2016 18:50	Shared: No EDIT
<u>Members</u>	Members	3 Download
Owner: kerrymarlow	Created: 29/Mar/2016 16:45	Shared: No EDIT
<u>New Customers</u>	New Customers	0 Download
Owner: kerrymarlow	Created: 30/Mar/2016 13:58	Shared: No EDIT

Delete Selected

Note that you cannot change or edit individual **numbers** in Maintain Groups, only the Group Name and Group Description. Numbers can be changed in **Maintain Numbers** (see page 9). **TIP:** if you hover your mouse cursor over the underlined **Name** in the box that appears showing your existing groups, it will show a snapshot of what's in your groups.

Import Data - Insert Single Number

There are 2 options for adding contacts to your Groups: **Insert Single Number** OR **Bulk Import**

INSERT SINGLE NUMBER: A single mobile number can be entered into an existing Group or the one you've just created in Maintain Groups earlier.

1. Select *Group to Insert into*
2. In *Number* field enter the *mobile number*
3. **Optional** - Enter *placeholders Value 1 to Value 6* (Equals Column B to Column G in an Excel Spreadsheet) if you have more data to add to the mobile number. (*More on placeholders further on*)
4. *Update if exists* – if the number is already in the system you can update it (eg data in Column B like a name change).
5. *Deleted* – This should always be ticked as it means a number has been blacklisted/Auto Deleted. You will need to contact us to un-Blacklist a number.
6. *Duplication* – SMS Express system automatically does *not* let you import a duplicate number into the *same* group but will allow the *same* number across *other* groups.

Ignore – (the default). Allows you to import a number into your new group even if that number exists in *other* groups. It does not check to see if the mobile number exists in your other groups though.

Check all my groups - Use this if you want to check to see if the mobile number is in any other groups

Check selected groups - Use this if you want to check to see if the mobile number is in certain groups

CLIENT LOGIN

Logged in as: [redacted] - Import my data

Insert Single Number:

Insert into: Clients (Numbers:3)
* - Groups created by another user

Number: 044455666

Value 1: Jane

Value 2: Fonda

Value 3:

Value 4:

Value 5:

Value 6:

Update if exists: Yes

Deleted: Don't 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 even if the number currently exists in one of your other groups.

Import single number

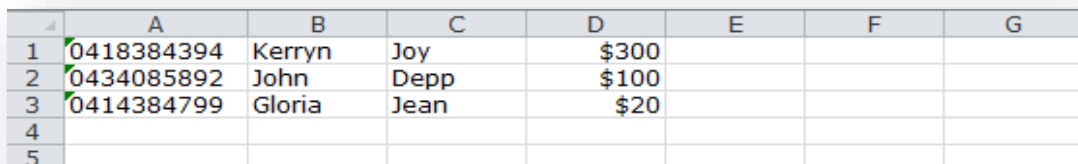
Bulk Import:

Insert into: Clients (Numbers:3)
* - Groups created by another user

I have added the First Name and Last Name of my contact into Value 1 and Value 2 so I can personalise if I want to. This is optional or you can add it later in Maintain Numbers

Import Data - Bulk Import – Prepare Your File

Here you can import your contacts into your **Group** that you created in **Maintain Groups** earlier. Prepare a spreadsheet in Excel with the *mobile numbers in column A*. You can add other data pertaining to that mobile number beside it in the other columns (Columns B to G represent *Values placeholders* which we will discuss shortly).



	A	B	C	D	E	F	G
1	0418384394	Kerryn	Joy	\$300			
2	0434085892	John	Depp	\$100			
3	0414384799	Gloria	Jean	\$20			
4							
5							

Note: In the spreadsheet to be uploaded, the data must start from row 1 and the Excel Sheet tab label at the bottom on the sheet must be named 'Sheet1' (this is the default label on excel worksheet tabs)

IMPORTANT: The first column (A) is for mobile numbers only. These numbers can be 0431234567 or 61431234567 or 431234567, or 6143234567. Don't worry if Excel chops the 0 off the front of the number, as the system will replace it with 61 automatically.

Columns B to G can be used for Placeholders ("merge fields") . This allows you to send a bulk SMS and make it appear personal (*Send Bulk SMS Message– Placeholders further on in section 3*).

For example:

Dear Kerryn Joy we thank you for your donation of \$300.

Dear John Depp we thank you for your donation of \$100.

Dear Gloria Jean we thank you for your donation of \$20

This is optional, and the system will ignore any data apart from Column A unless you insert Placeholders.

Other file formats:

You can also use *Notepad* to create your list (found under Accessories in Microsoft Windows).

1. Mobile numbers need to be the first field in the file.
2. Separate the columns with commas. Up to 7 separated data fields with commas are allowed (see example below).



How To Bulk Import Data

Once your spreadsheet of contacts has been prepared, it can be imported into **Import Data > Bulk Import**

1. Insert into - Select which *Group* data is to be imported into. If there is data already in the group, the new data will only be added..it will not delete data already in the group

2. Browse for the file you want to import

3. Select the File type you wish to import: *Excel, CSV or Text*

4. Update if exists –if the number is already in the system you can choose to update any data in that record (e.g. a name change), otherwise you can leave unticked.

5. Deleted – This should usually always be ticked as it won't let you import Blacklisted numbers (optouts).
You will need to contact us to un-Blacklist a number.

6. Duplication – SMS Express system automatically *does not let you* import a duplicate number into the *same* group but will allow the same number across *other* groups.

- **Ignore** - Use this if you don't want to check to see if the mobile number is in other groups
- **Check all my groups** - Use this if you want to check to see if the mobile number is in any other groups
- **Check selected groups** - Use this if you want to check to see if the mobile number is in certain groups

7. Click *Bulk import from file*

8. The *import confirmation box* then pops up for you to check the import status:

- **Updated** counts the number of mobile numbers with updated information (Values)
- **Errors** counts the number of empty rows
- **Duplicates** are counted – they are not imported
- **Opt outs/Blacklisted** are counted – they are not imported

The screenshot displays the 'Bulk Import' form with the following details:

- Bulk Import:** Header for the form.
- Insert into:** A dropdown menu set to 'New Customers (Numbers:0)'. A note below reads '* - Groups created by another user'.
- File to upload:** A 'Choose File' button next to the filename 'sample_sms...excel.xlsx'.
- File type:** A dropdown menu set to 'Excel'.
- Update if exists:** A checkbox labeled 'Yes (Updates can take a long time to complete)' which is currently unchecked.
- Deleted:** A checkbox labeled 'Don't import if number exists in Auto Deleted' which is checked.
- Duplication:** Three radio button options: 'Ignore' (selected), 'Check all my groups', and 'Check selected groups'.
- Confirmation box:** A dashed-line box containing the text: 'All numbers imported into a group are unique. This setting will allow you to import the number even if the number currently exists in one of your other groups.'
- Buttons:** A 'Bulk import from file' button is visible at the bottom of the form.

Import Instructions:

You can import files in the following formats:

Excel:
Importing data from excel is by far the easiest. The data is imported from "Sheet 1" only (please ensure that the name of worksheet is 'Sheet1'). The excel document must contain the mobile number in Column "A". Any additional data may be inserted in columns "B" through "G". The data will be imported into 6 Value fields; Column "B" will appear in Value 1 etc. Each field can contain 50 characters with the exception of Value 1 or Column "B" which can accommodate data up to 500 characters. This allows you to import a file with the number in Column "A", and the message in Column "B". When sending to the group leave the message blank, simply click on "Value 1", this will place the message (stored in Value 1) into the message field when sent. [Click here for an example.](#)

CSV/Text:
Importing from a CSV (Comma Separated File) or Text file is just as easy. The files data is simply separated with a comma (.). The number must be inserted as the first field in the file. You can create a CSV file from an Excel spreadsheet by saving the Excel file as "CSV" (MS-Dos) file type and not Excel workbook. The benefit of using CSV as the file type is the smaller file size [Click here for an example.](#)

Single Message/ Send Single SMS

To send a single SMS:

1. You have the option to: **Send Now** OR **Send Later** to schedule OR **Send Between** (drip feeds)
2. Enter the mobile number/s into the *To* box
3. Type your message OR Insert **Template** if you have created one (see *How to create a template further on*)
4. Optional: **Replies Routing dropdown box choices:**

Account Defaults: this uses *Incoming messages forwarding settings* defaults

Custom: This overrides your defaults and allows you to add a different "forward replies to".

5. **Sender ID:** If you have created one, select it here. Or leave on **Repliable** to get replies into your Replies inbox.
6. **Campaign Name:** For your reference, enter your *Campaign* name, otherwise leave blank
7. Click **Preview SMS** to preview and check your message. If all looks good, click **Send Messages**, or close and edit.

The screenshot displays the 'Send Single Message' interface. On the left is a 'CLIENT LOGIN' sidebar with a menu including 'Single Message'. The main area is titled 'Send SMS' and contains the following fields:

- Current Time:** 30/Mar/2016 14:48 to alter [click here](#)
- Options:** Send now Send later (Messages will be sent at the current time)
- To:** 0418384394 (comma separate numbers)
- Message:** Select template dropdown, followed by a text area containing: "Hi Olivia just confirming your appointment at 4pm. The Gap Dental Service"
- Replies routing:** Account Defaults dropdown
- Options:** SenderID: Repliable dropdown; Campaign name: empty field; Cost Centre: Tester

Buttons for 'Preview SMS' and 'Reset all fields' are at the bottom of the form. A large curved arrow points from the 'Preview SMS' button to a 'Send information' window below. This window shows:

Send information: (Campaign - NA)

- Send at:** 30/Mar/2016 16:00
- SMS:** Hi Olivia, just confirming your appointment at 4pm. The Gap Dental Service
- From:** Repliable (2 way)
- Reply Rules:** Default
- Duplicates:** 0
- Messages:** 1
- Credits:** 1

Buttons for 'Send messages!' and 'Close' are at the bottom of the preview window.

Send Bulk SMS Messages

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- Sub-Accounts (Holding)
- Blacklist / Auto Deleted
- API guide
- Logout

Logged in as: 'XXXXXXXXXX' - Send Bulk Message

View: My groups Sub-accounts only My and my sub-accounts groups

Name	Description	Numbers	Created Date
<input checked="" type="checkbox"/> Clients	Clients	3	28/Jan/2016 18:50
<input type="checkbox"/> New Customers	New Customers	3	29/Mar/2016 16:45

Send SMS

Current Time: 30/Mar/2016 16:17 to alter [click here](#)

Options: Send now Send later Send between
(Messages will be sent at the current time)

Message:

Placeholders: Value1 Value2 Value3 Value4 Value5 Value6 OptOut

Template: Select template

Message: Hi thank you for your donation!
Regards BigHeart Charity

Message: (Characters used : 58, Messages : 1)

Replies routing: Account Defaults

Options:

SenderID: Repliable

Campaign name:

Cost Centre: Tester

[Preview SMS](#) [Reset all fields](#)

Credits: 45

1. On Bulk Message screen, tick the box beside the correct group you want to send the message to
3. Select broadcast time: **Send Now, Send Later or Send Between** (make sure your Current Time is correct)
4. Type your message in the [Message](#) box or use a [Template](#) you created
5. **Replies Routing dropdown box choices:**

Account Defaults: this uses *Incoming messages forwarding settings* details in your **Account Settings** OR
Custom: This overrides your defaults and allows you to add a different "forward replies to" address

6. **Sender ID:** If you have created one, select it here. Or leave on **Repliable** to get replies into your Replies inbox.
7. **Campaign Name:** For your reference, enter your *Campaign* name, otherwise leave blank
8. Click **Preview SMS** to preview and check your message. If all looks good, click **Send Messages**, or close and edit.

If you'd like to personalise each SMS, use your **Placeholders**. We'll show you how to do this on the next page:

Placeholders - Personalisation

When we prepared the spreadsheet for bulk import earlier, we had info on Columns B C D, which we IMPORTED into the relevant Group. These correspond with the **Placeholder** fields in the system, and allows you to super-personalise your messages if you wish to (called "mail merge" in direct marketing parlance).

Value 1 = Column B **Value 2 = Column C** **Value 3= Column D** **Value 4 = Column E**

Value 5 = Column F **Value 6 = Column G** **OptOut = Inserts a link that your recipient can click to optout.**

Column A is always a mobile number

	B	C	D	E	F	G
1	0418384394	Kerryn	Joy	\$300		
2	0434085892	John	Depp	\$100		
3	0414384799	Gloria	Jean	\$20		
4						
5						

Dear **Kerryn Joy**, thanks for your **\$300** donation

Dear **John Depp**, thanks for your **\$100** donation

Dear **Gloria Jean**, thanks for your **\$20** donation

You can see in the above example of a donator database, I prepared the data in my spreadsheet, which I then imported into the Group in my SMS Express account. Then on below example I personalised my messages with a Firstname Lastname and Donation amount in the text messages, so in Bulk Message Box I inserted the Value 1 Value 2 and Value 3 plus Optout fields into the message....nice and personal!

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- Number Lookup Report
- SMS Sending Report
- Summary Report
- Sub-Accounts
- Sub-Accounts (Holding)
- Blacklist / Auto Deleted
- API guide

Logged in as: [User] - Send Bulk Message

View: My groups Sub-accounts only My and my sub-accounts groups

Name	Description	Numbers	Created Date
<input checked="" type="checkbox"/> Clients	Clients	3	28/Jan/2016 18:50
<input type="checkbox"/> New Customers	New Customers	3	29/Mar/2016 16:45

Send SMS

Current Time: 30/Mar/2016 16:17 to alter [click here](#)

Options: Send now Send later Send between
(Messages will be sent at the current time)

Message:

Placeholders: Value1 Value2 Value3 Value4 Value5 Value6 OptOut

Template: Dear @@value1@@ @@value2@@ tha...

Message: Dear @@value1@@ @@value2@@ thanks for your donation of @@value3@@ . BigHeart Charity
[www.opt-out.co/@@@](#)

Message: (Characters used : 106, Messages : 1)

Opt Out Confirmation:

Custom Opt Out Message: _____

Replies routing: Account Defaults ▾

Options:

SenderID: Repliable ▾

Campaign name: _____

Cost Centre: Tester

Send information: (Campaign - NA)

Send at: 30/Mar/2016 16:42

SMS: Dear Gloria Jeans thanks for your donation
BigHeart Charity
[www.opt-out.co/@@@](#)

From: Repliable (2 way)

Reply Rules: Default

Duplicates: 0

Messages: 3

Credits: 3

Using Maintain Numbers Address Book To Send SMS

Maintain Numbers is online your address book, and it has several functions which are detailed below. But here's a quick guide to sending one or many SMSs from **Maintain Numbers** (instead of Single or Bulk SMS)

1. Select the **Group** name you need, or leave as **All groups** if you want to cherry pick from all **Groups**
2. You can also enter search criteria to locate specific contacts (eg Value 1 might be a first name in your list) or leave blank to show all numbers in a selected group
3. Select **Display 'value' fields** to show the whole record of your contacts (eg Value 1 field data)
4. Sort numbers by Number or Value and Ascending (ASC) or Descending (DESC)
5. Choose Set Size – 20, 50 or 100 numbers viewed per page
6. Now simply tick the boxes of the numbers you want to send to, click Send SMS to selected, the message screen will pop up, then type and send your message.

NOTE: You can send SMS to selected numbers or all numbers on the fly. There is a **SELECT ALL** or **NONE** function to assist in working with your data. There's more on Maintain Numbers section further on.

CLIENT LOGIN

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- Maintain Numbers**
- Import Data
- Single Message

Maintain Numbers has many different functions, plus you can also send SMS to selected people within Groups and /or across all Groups if you wish. This saves you creating a new Group for a one off blast. More info further on.

- API guide
- Logout

Credits: 45

Logged in as: ' [redacted] ' - Maintain Numbers

Search Filter:

Group name: **All groups** ▼
 * - Groups created by another user

Number:

Value1: Value2:

Value3: Value4:

Value5: Value6:

Sort: **Number** ▼ **ASC** ▼ Display: Display 'value' fields in results

Set Size: **20** ▼

Search Data

Move/Copy selected **Delete selected** **Send SMS to selected**

Sets: 1 Select ALL/N

Number	Group	Share		
<u>61414384799</u>	Clients	NA	EDIT	<input type="checkbox"/>
Gloria	Jeans	\$20		
<u>61414384799</u>	New Customers	NA	EDIT	<input type="checkbox"/>
Vicki	Voda	\$33		
33				
<u>61418384394</u>	Clients	NA	EDIT	<input type="checkbox"/>
Kerryn	Telstra	\$300		
<u>61418384394</u>	New Customers	NA	EDIT	<input type="checkbox"/>
Tessy	Telstra	\$56		
56				
<u>61434085892</u>	Clients	NA	EDIT	<input type="checkbox"/>
John	Optus	\$100		
<u>61434085892</u>	New Customers	NA	EDIT	<input type="checkbox"/>
Olivia	Optus	\$22		
22				

Sets: 1 Select ALL/N

Move/Copy selected **Delete selected** **Send SMS to selected**

How To Cancel A Scheduled SMS

1. Go to **Sent/Queued** page
2. Select **Date Range** (if today it will be there already or select date you scheduled) then **Search**
3. Below **Date Range**, find your scheduled broadcast and click on **View** to open the **Viewing Send** box.
4. Click **Pause**...see example below. A box will open asking you to confirm the **Pause**. Then the box will change to **Release/Cancel**...click **Cancel** to stop the scheduled broadcast (**Release** will 'unpause' and allow the broadcast to go ahead).
5. A popup box will confirm the cancellation and return the unused credits to your account.

Select Date Range

Start date: Mar 30 2016

End date: Mar 30 2016

Campaign name:

Search

Scheduled for	Submitted	Nums	Cost (credits)	VIEW/ACTION
30/Mar/2016 09:13	30/Mar/2016 09:12	3	3	VIEW
Test 913				
30/Mar/2016 10:14	29/Mar/2016 18:13	0	0	VIEW
Dear Oliviaactus thanks for your donation of \$22				
30/Mar/2016 11:53	30/Mar/2016 11:53	1	1	VIEW
test sid				
30/Mar/2016 18:43	30/Mar/2016 17:50	3	3	VIEW
Dear Gloria Jeans thanks for your donation of \$20				

Viewing send:

All -View / Download CSV / Download Excel 2007

Staged -View / Download CSV / Download Excel 2007

Submitted -View / Download CSV / Download Excel 2007

Unknown -View / Download CSV / Download Excel 2007

Expired -View / Download CSV / Download Excel 2007

Undelivered -View / Download CSV / Download Excel 2007

Delivered -View / Download CSV / Download Excel 2007

Replies -View / Download CSV / Download Excel 2007

Opt outs -View / Download CSV / Download Excel 2007

Group name	Group description
Clients	Clients

Status	Percentage(%)
Processed	0%
Not processed	0%
Paused	100%
Waiting on delivery receipt	0%
Delivered	0%
Undelivered	0%
Expired	0%
Other	0%

Viewing send:

All -View / Download CSV / Download Excel 2007

Staged -View / Download CSV / Download Excel 2007

Submitted -View / Download CSV / Download Excel 2007

Unknown -View / Download CSV / Download Excel 2007

Expired -View / Download CSV / Download Excel 2007

Undelivered -View / Download CSV / Download Excel 2007

Delivered -View / Download CSV / Download Excel 2007

Replies -View / Download CSV / Download Excel 2007

Opt outs -View / Download CSV / Download Excel 2007

Group name	Group description
Clients	Clients

Status	Percentage(%)
Processed	0%
Not processed	0%
Paused	100%
Waiting on delivery receipt	0%
Delivered	0%
Undelivered	0%
Expired	0%
Other	0%

cp.smsexpress.com.au says:

Are you sure you want to Pause this send?

OK **Cancel**

Release / Cancel

Done!

Account Settings

You can change the following here:

Change Your Password – Just enter the new one twice beside **Password** and **Confirm Password**, Click on **Update Account**. Note you cannot change your Username. Contact us if you want to create a new username and we can transfer any credits to the new account).

Update your contact info like phone numbers, email address and phone numbers.

Time Difference – The Current Time is set to Australian Eastern Time (QLD time) which is **Server Time + 8 hours (480 minutes)** and does not automatically adjust to Daylight Savings or other time zones. Your account's Current Time is also shown in Bulk and Single Message pages. Current Time is an issue if you need to schedule messages. So ensure your time is correct so you don't send message later/earlier than you thought!

Low Credit Warning - The system will send you an email when your tank is running low. Set the warning to whatever amount you wish.

Sending From Outlook: - If you're sending SMS via Outlook, you can change the SenderID. This means, who the text is from. If you leave it blank the SMS will come from one of our 2 system numbers (also called 'shared numbers'). You can use your own mobile number or a word (11 characters) Bear in mind, if you use a word, **your recipient cannot reply**. We'd normally advise leaving this blank, but you have the option to change it..

Opt-Out Email Notification – You can tell the system to email you when someone opts out (replies with STOP or REMOVE). Most people leave this unticked. You can always view optouts in the Replies section. See also *Incoming Messaging Forwarding Settings* below.

Opt Out Confirmation – Custom Optout Message –

Your recipients can opt out (unsubscribe) in 2 ways:

- 1) By replying STOP or REMOVE to your message. However if you change/customise your Sender ID, they cannot reply. So the other solution is:
- 2) In the *Bulk Message* screen you can add the **Opt Out placeholder** into the message (usually at the end of your message).

This adds a clickable link into your message, and if recipients click this link, their number will be automatically Blacklisted so you can't send any more bulk SMS to that person.

This Opt Out Confirmation option allows you to customise the opt out confirmation message that is displayed on the webpage after they have unsubscribed. But you can leave this blank if you wish.



Reporting – You can elect to have summary reports of your broadcasts emailed to you Daily and/or weekly, and this is automatically selected by default when you create an account.

Cost Centre Default - This optional field is for you to use if you wish, and have the info displayed on your message sending pages. If you don't need it, just leave it blank.

Incoming messages forwarding settings (defaults) -

Forward replies to mobile or email – Replies to your sent SMS's can be forwarded to your email address (free). You can also change the format of the emails that are forwarded to you, so you only receive relevant info. Where it says **Email format**, select Custom and some options will appear. You can view a video in our Help Centre which may be easier to follow. Or contact us and we can do this for you.

Send response to reply – If someone replies to your message you can send an SMS response to that reply (2-way SMS). In other words, you can reply to the reply, like a "Thank you" message. As it's an outbound SMS it will cost 1 credit.

Forward data to URL – If you want to have sent messages and replies forwarded to a website.

API Duplicate check - This is for your IT person to use with your own system.

Online Payments: 8.5c inc GST per credit

This is where you can purchase instant credits via PayPal. If you don't like PayPal, simply call or email us for other options including requesting a tax invoice for later payment via EFT, or credit card over the phone via our SecurePay/DirectOne merchant facilities.

Maintain Numbers (Address Book)

View numbers in group:

1. Select the **Group** you want to view, or leave to default to all groups
2. Enter search criteria or leave blank to show all numbers in a selected group
3. Select **DISPLAY** if you want to display the values you added in when loading your data, e.g. Value1 could be the client name. This will help you to identify who the number belongs to
4. Sort numbers by **Number** or **Value** and **Ascending** (ASC) or **Descending** (DESC)
5. Choose **Set Size** – **20, 50 or 100** numbers viewed per page
6. Numbers are listed below the Search Filter area

Edit Numbers: Each number can be edited by clicking **EDIT** box next to the relevant number.

Delete Numbers: Numbers can be deleted individually. **Select** and click **Delete selected**.

***Send SMS to selected numbers:** You can send SMS to selected numbers or all numbers on the fly. There is a **SELECT ALL** or **NONE** function to assist in working with your data.

Move/Copy numbers in group:

1. Select numbers to move/copy from a group. Click **Move/Copy Selected**
2. Select **Action** – **Move or Copy**
3. Select **Group**
4. **Update** or **ignore** the contact if it exists
5. Select **Go**

***Note: Important!** The size of your sets can be set to 20, 50 or 100. This is to assist when sending selected SMS.

Once you go to the next set your previous set selections are not carried over. It is important to **select one page then send your SMS**. Or you may want to Export your Selections and create a new Group if it's over 100 numbers.

Create SMS Templates

This is a real time saver if you send the same or very similar message. Set up your SMS message here and save it....easy as that! When you need to send a Single SMS or Bulk SMS, there is a drop down menu from which you can select your created SMS Templates, do some minor editing on the fly if required, and send.

How to create a template :

1. Go to **SMS Templates**
2. Beside **Template** type your message (using placeholders if required)
3. Click **Create Template** and you're done!

CLIENT LOGIN

- Home Page
- Account Settings
- Online Payments
- Maintain Groups
- Maintain Numbers
- Import Data
- Single Message
- Bulk Message
- SMS Templates**
- Reply Routing
- Sender ID's
- Replies
- BDay - Groups
- BDay - Numbers
- BDay - Import Data
- Sent / Queued

Logged in as: 'XXXXXXXXXX' - Maintain Message Templates

Create Message Template:

Value1 Value2 Value3 Value4 Value5 Value6

Template: Hi @@value1@@

Preview: Hi @@value1@@

Characters Used Chars: 13 (1 message)

Create Template

Template

Dear @@value1@@ @@value2@@ thanks for your donation of @@value3@@	<input type="checkbox"/>
Dear @@value1@@ @@value2@@ thanks for your donation.	<input type="checkbox"/>
Dear @@value1@@ big sale on at	<input type="checkbox"/>
Dear @@value1@@, see you for the launch.	<input type="checkbox"/>
Dear member, see you at Friday.	<input type="checkbox"/>
Hi @@value1@@ @@value2@@, thanks for your @@value3@@ donation	<input type="checkbox"/>

Delete Selected

B-Day Groups

Never forget a birthday or anniversary again! Birthday Messages are sent to your contacts automatically. All you need to do is create your *BDay* list on an Excel spreadsheet, then create a *BDay group*, add a message, select a sending time and import your information. Set and forget!

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.

We have a separate **User Guide** for **Birthday groups**, but it is very easy to setup. Please email us for the Guide, or simply download the guide yourself from the **Help Centre**.

Reply Routing

Reply routing allows you to setup **rules** telling the system what to do when certain "keyword" replies are received back from your outbound SMS.

Say you want to send out an event invite and want the YES and the NO replies to go to different mobile numbers and/or email addresses... you can even add a custom reply to the Yes or No replies.

For example, for those who reply YES, you can tell the system to forward these messages to your mobile and email address and send people back a *thank you* SMS.

Remember that forwarding to a mobile number from SMS Express system will cost a credit, but emails are free

Now, go to **Bulk Message** screen to setup your broadcast.

The example on the right shows that I have used a **Template** but the choice is yours.

Now select **Replies routing** rule from the dropdown menu.

Next, **Preview SMS**, and the mini pop up screen will appear awaiting your instructions, and if all looks good SEND! *Note you can also view responses in Replies*

CLIENT LOGIN

- Home Page
- Account Settings
- Online Payments
- Maintain Groups
- Maintain Numbers
- Import Data
- Single Message
- Bulk Message
- SMS Templates
- Reply Routing**
- Sender ID's
- Replies
- BDay - Groups
- BDay - Numbers
- BDay - Import Data
- Sent / Queued
- Date Range report
- Number Lookup Report
- SMS Sending Report
- Summary Report

Logged in as: '...' - Create Reply Rule Set

Instructions:
To create a reply rule set, you must specify the following:
Rule Set name
Opt out rule
Rule(s)
When a message is received, the system will run the rule check consisting of the words or phrases specified by you.
Each subsequent rule is run in the order on the screen (from top to bottom). If a rule is made the system will apply the rule, run the forwarding and response processing any further rules.
Reply Rules allow you to specify a list of words or phrases that the system will check in the message. You can specify if the message should start with one of the words or contain all the words. Click on "Create additional rule +" to add a rule.

Create Reply Rule Set:
Name: []

Opt out Rule:
Phrases: []
Email: []

Send SMS

Current Time: 30/Mar/2016 19:04 to alter [click here](#)

Options: Send now Send later Send between
(Messages will be sent at the current time)

Message:

Placeholders: Value1 Value2 Value3 Value4 Value5 Value6 OptOut

Template: Dear @@value1@@ @@value2@@ tha...

Message: Dear @@value1@@ @@value2@@ thanks for your donation of @@value3@@

Replies routing: Custom

Forward to mobile: []

Forward to email: kerryn@smsexpress.com.au

Send response:

Options:
SenderID: Repliable
Campaign name: []
Cost Centre: Tester

Preview SMS **Reset all fields**

Sender ID's

Text messages are usually sent from a mobile number and the SMS Express system uses 2 “shared numbers” so you can send SMS and receive replies in your online account, plus have these forwarded to your email address.

This “from” number shows up on the recipient’s phone and is called **SENDER ID** (like a Caller ID..who it came from).

However, you may want to show the SMS as being from your company **name** instead of our default shared numbers. The SMS Express system allows this and you can customise the Sender ID. The Sender ID can accommodate up to 11 characters so you may want to use your organisations’ name if appropriate.

Please note: if you use a WORD as a Sender ID (eg ACME HAIR), this is not a **repliable** path meaning there is no NUMBER to send a reply to. Therefore your recipients will not be able to reply to your messages. So we recommend adding your organisation’s number (or equivalent) in the message itself. Also some telcos may block WORD SENDER IDs as spammers use them!

You can also use your own mobile number as a SENDER ID if you wish to get replies to your handset. Do some testing first to a few different handsets on different networks if possible to make sure they all show properly and you get Replies (we have all 3 networks so feel free to ask us for help to test).

IMPORTANT: The **OptOut placeholder** should be used if you send a ads or promotions) using a word SENDER ID, so recipients can opt out from within the actual message instantly if they wish to. Under the Spam Act 2003, you must include an easy way for people to stop receiving your messages at minimal cost to them. Asking your recipients to call a number or send an email to opt out will likely annoy them (put yourself in their shoes). The OptOut placeholder is a good solution so we encourage you to use it.

Replies

All replies to your messages can be viewed online and searched by date. You can also filter further by searching for *All, Read or Unread* replies. To easily identify the sender, you can include **Values 1 to 6** by clicking *Include Sent detail*, and click *Search*.

Also, from the **Replies** section you can download the replies in a nice spreadsheet (handy for surveys), **Blacklist** a number, or send a one-off single reply SMS to that person on the spot if you wish (2-way SMS). Remember that replies with opt-out requests like STOP or REMOVE will be automatically **Blacklisted** by the system.

The screenshot shows the SMS Express web interface. On the left is a 'CLIENT LOGIN' menu with options: Home Page, Account Settings, Online Payments, Maintain Groups, Maintain Numbers, Import Data, Single Message, Bulk Message, SMS Templates, Reply Routing, Sender ID's, Replies (highlighted), BDay - Groups, BDay - Numbers, BDay - Import Data, Sent / Queued, Date Range report, Number Lookup Report, SMS Sending Report, Summary Report, Sub-Accounts, and Sub-Accounts (Holding). The main area shows 'Logged in as: [redacted] - Replies'. Below this is a 'Select Date Range' form with fields for Start date (Mar 30), End date (Mar 30), From number, Containing word, Campaign, View (Read) (All), Include Sent detail (True), and Set Size (20). A 'Search' button is at the bottom right. Below the search form is a 'Blacklist selected' button. At the bottom, it says 'Sets: 1'. A table of replies is shown with columns 'PhoneNumber' and 'Date'. The table contains three rows of incoming replies from Optus, Voda, and Telstra, each with a 'Reply' link and a date of 30/03.

PhoneNumber	Date
61434085892 >> Reply	30/03
Incoming: Optus	
61414384799 >> Reply	30/03
Incoming: Voda	
61418384394 >> Reply	30/03
Incoming: Telstra	

Sent/Queued Report & Other Reports

View the results of the SMS's you've sent over the last 6 months by clicking **Sent/Queued**. *Expand* and click on *View* or *Download* to see more details such as *Delivered*, *Undelivered*, also any that have been delayed, OptOuts received etc. Also if you download the CSV or EXCEL versions you will also see network of the number sent to. **We encourage you to view this report after every campaign so you can spot any issues with wrong numbers.**

So when you open a **SENT/QUEUED** report, what do the various status reports mean? The main ones are:

- **DELIVERED** – was successfully sent out.
- **UNDELIVERED** – was not successful. Usually is a wrong number, so it's a good idea to keep an eye on these and clean out the dead numbers (if you need assistance with this, let us know).
- **EXPIRED** - I wish we could guarantee 100% delivery but nobody on the planet can.. Normally deliverability is pretty good, but what lets us all down is the telcos (Vodafone especially is a problem in non-metro areas), or if a customer's phone is switched off or out of range for an extended period. These sorts of errors are reflected in your reports as EXPIRED. This means the system has tried to send and has given up.
- **SUBMITTED** – means the message has been sent to that person's telco and out system is waiting for confirmation (called a delivery report). If you check back in a little while, this is normally updated to DELIVERED.
- **NO NETWORK** – usually means a totally wrong number like a landline or number is too long or short, or wrong prefix (if you get a lot of these please alert us ASAP).

You also have access to other reports such as:

- **Date Range Report** – this is a downloaded or emailed report that goes back over the last **month**. It is fairly detailed and includes the network of the mobile number it was sent to (in the ZIP file this is the Line Item report). You can customise what fields you want. It may take a few minutes to generate for download so please be patient.
- **Number Lookup Report**- this will generate a zipped spreadsheet report, and is handy to view the history of a mobile number. The report will show Group Summary and Sent Items for the **last 6 months**. You could use this report if you suspect a mobile number may not be getting texts. A history of UNDELIVERED would indicate the number is disconnected and needs investigating OR number may be lurking in the Blacklist.
- **SMS Sending Report** – this is an on screen report (or you can download Excel report) that shows you a chart and a daily or monthly breakdown of how many SMSs have been sent **over the last 6 months**. Like all the reports, you can select the date range.
- **Summary Report**. This will generate a zipped Excel report and you can get a detailed report of the messages, number of replies and optouts, the cost etc **for the last month**.

Remember to download reports regularly if you need them, as we cannot access them after the time has elapsed. Note **Replies** stay in your account for 3 years.

Sub Accounts

Any SMS Express account holder can create **Sub Accounts** where others can have their own SMS accounts with their password and username under a Master (Primary) Account.

These are **free of charge** and you can create as many as you need.

A Sub Account has all its own functions, including its own Server Time (important if scheduling messages) . The only thing a Sub Account holder **cannot** do is buy and allocate credits..that has to be done by the Master account.

You can enable the **Auto Top Up function** so a Sub Account doesn't run short.

Create a **Sub Account** by adding in *Username, Password and Full name*. Click **Create Sub Account**. To EDIT the Sub Account click **EDIT** on the relevant account. Here you can transfer credits to the Sub Accounts from the Master account.

Maintain Groups: When creating a group, the option exists to make the group available to a Sub-Account holder as "Read Only" or "Write". The Sub Account holder is also able to create groups and allocate "Read Only" or "Write" status to the Master.

Require Authorisation: Apply this function to ensure messages composed by a Sub Account holder are authorised/approved by the Master account before being released. These messages can be viewed in **Sub-Accounts (Holding)** on the menu, and action taken to "Release" or "Decline" SMS's.

Regarding Optouts/Blocklist: If you have optouts (people who unsubscribe), the system will automatically suppress Blacklisted numbers for Bulk SMS in the Master and Sub Accounts.

Blacklist/ Auto Deleted

Numbers placed on the Blacklist/auto delete list (usually by the automatic opt-out process) will be suppressed from Bulk Messages you send plus if you try to re-import. This helps you stay compliant with the Spam Act 2003. Blacklisted numbers include any person who has requested to be removed from your list by replying STOP, REMOVE, CANCEL or other similar words. Similarly, if you use the OptOut Placeholder, recipients who click this will also be Blacklisted. To have a number "unBlacklisted", please contact us, as our technicians must manually remove them.

Note that the Blacklist will prevent you sending a *Bulk Message* to that number. **However, you can send a Single SMS to a blacklisted number because it does not pull from the Groups/databases.**

Also you can manually add a number to the Blacklist at any time OR check if a number is on the Blacklist.

Username	Fullname	Credits	Active	Edit
Nolan	Nolan Spratt	0	True	EDIT

Sub-Account Details:	
Account created:	30/Mar/2016 10:46
Username:	Nolan
Password:	jackpratt
Full name:	Nolan Spratt
Credits:	0
Activated:	<input checked="" type="checkbox"/> True
TimeDifference:	640
Require Authorisation:	<input checked="" type="checkbox"/> True
Enable Auto Top up Credits:	<input checked="" type="checkbox"/> True

Tip: The system usually picks up all opt-out requests and Blacklists automatically, but not all people opt-out the same way, so always check your REPLIES after a broadcast to ensure you don't miss any opt-outs. You can also Blacklist a number from the REPLIES section on the fly.

Tip: If one of your subscribers complains that they are not receiving your SMS's, check that they are not on the Blacklist "by accident". This can (and does) happen if they accidentally opt themselves out by the methods above.

API Guide – SMS Gateway

This is for when you want to use SMS Express to 'talk' to your own system, so using us as a gateway. For example, from Outlook or your own CRM system, or posting to your website. Our API guides are available free of charge at anytime, and you will see the download links on this page, or on our website. You can also get info from www.mymobileapi.com. Ask your IT specialist to download and view the guides.

Please note we cannot support third party software, but we will assist where we can.

Sending SMS From Outlook or Other Email Programs

There are step-by-step PDF Guides for Outlook and all other email programs on our dedicated webpage which you can view <https://smsexpress.com.au/sms-from-email.html>.

Sending SMS From Excel

We have an Excel add-in for Windows PC where you can send text messages directly from your spreadsheet. This is free for all SMS Express customers. More info here: <https://smsexpress.com.au/sms-from-excel.html>.

Logout

To leave your "session" click logout (bottom of the main navigation menu left hand side) so no-one can access your account once you have left your PC.

Don't forget to view our online help videos & articles.

Visit www.smsexpress.com.au and click HELP CENTRE

**Or if you just don't have time and want a friendly lady to help you,
call us on 1300 668 287 😊**