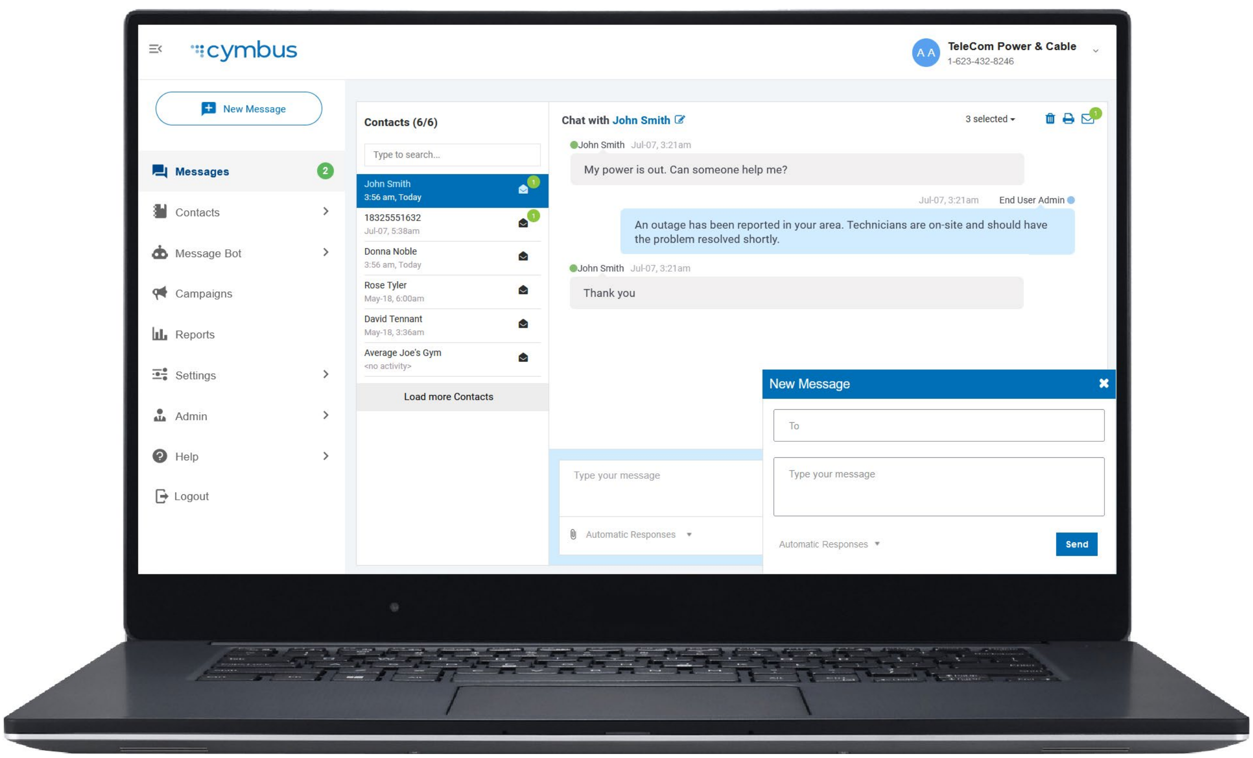
Business Text Messaging

MESSAGING PORTAL USER GUIDE
OCTOBER 2023



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WELCOME

Texting is one of the easiest and most accessible ways to communicate. With Business Text Messaging, you can send 1:1 or bulk text messages to resolve customer inquiries, send appointment reminders, promote special events, and automate responses to common questions—all from the business phone number your customers already know and use.

It's as easy as 1-2-3!

1. ENABLE

Text messaging is enabled on your existing number.

2. INBOX

Incoming texts are delivered to a private inbox.

3. CHAT

Send and receive text messages in the portal.

Highlights

Shared Inbox	All your agents are working out of the same inbox of text messages, which opens the door for a variety of use cases.
Human Conversations	Chat one-on-one with your customers about things they'd normally call in for.
Broadcasts	Send campaign messages to multiple contacts at once. Use Contact Lists to make sure the right contacts get the right message. It's great for customer loyalty programs.
Multi-Use	Empower anyone who works for the business to engage in this channel, each monitoring and responding to inquiries from any text enabled phone numbers.
Automation	Curate a list of keywords to answer common questions, like your business hours and address, without the need or intervention of a human agent.

Messaging Plans

There are three monthly messaging plans for Business Text Messaging. The features you have access to depend on the plan you've signed up for. Talk with your service provider to select the messaging plan that is right for your organization.

FEATURE	STANDARD	ADVANCED	PROFESSIONAL
Message Types	SMS	SMS + MMS	SMS + MMS
Text-Enabled Numbers	1	Multiple*	Multiple*
Users	1	Multiple*	Multiple*
Outbound Messages	500	2000	Rate Per Msg
Inbound Messages	Unlimited	Unlimited	Unlimited
Contacts	Unlimited	Unlimited	Rate Per Msg
Contact Importing	✓	✓	Unlimited
Reports	✓	✓	✓
1:1 Messages	✓	✓	✓
Response Templates	✓	✓	✓
Bulk Responses		✓	✓
Keyword Intelligent Responses		✓	✓
Scheduled Auto-Responses		✓	✓
Scheduled Campaigns		✓	✓

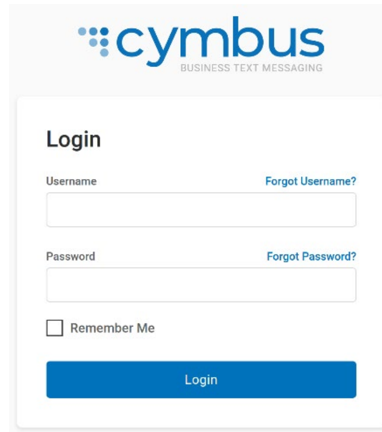
FINE PRINT

All plans include one text-enabled phone number and one user. On the Advanced and Professional plans, there is an additional charge for each additional phone number and/or user on the account. Overage charges apply to each message sent over the plan limits.

Log In to the Messaging Portal

A *Welcome* email that contains your login details was sent to you when the account was created. Keep it safe!

Click the link in that email to create your password, then go to https://messaging.cymbus.com/ and log in.

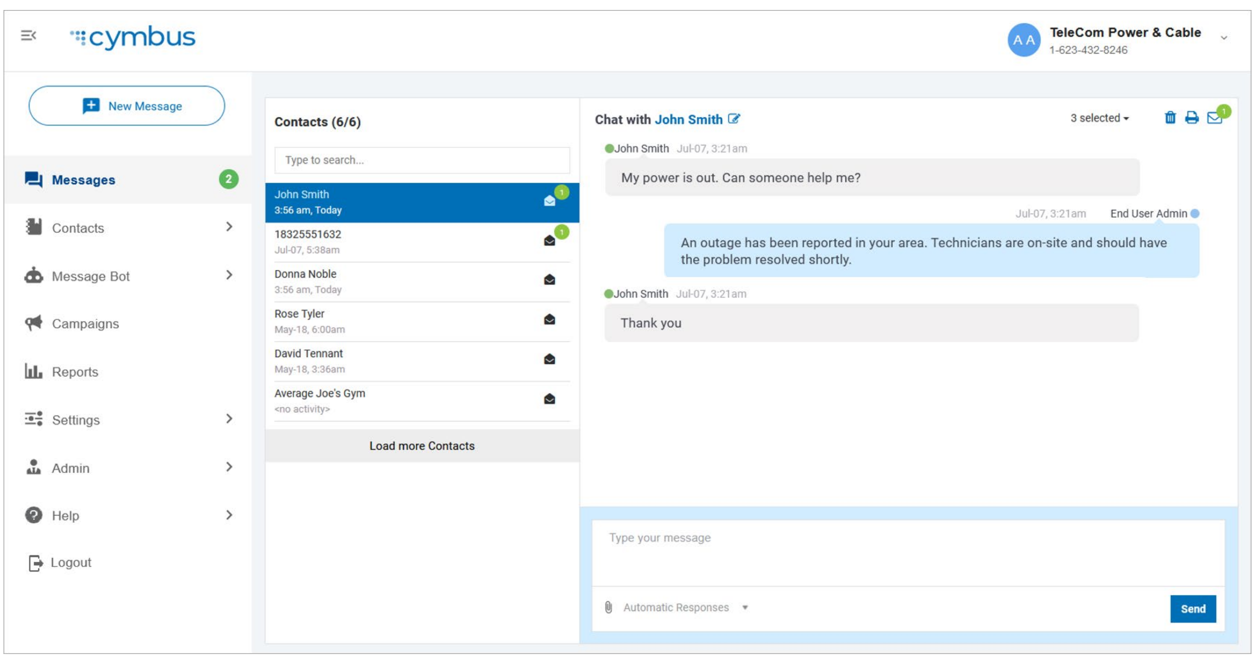


PASSWORD REQUIREMENTS

Your password must be 8–16 characters long and include uppercase and lowercase letters and at least one number. If you forget your password, click the link on the login screen.

Navigating the Portal

Upon logging in to the account, you'll land on the Messages dashboard for your primary phone number. This your shared messaging inbox from which you'll read and respond to messages. We'll go over those details later.



Navigation Menu

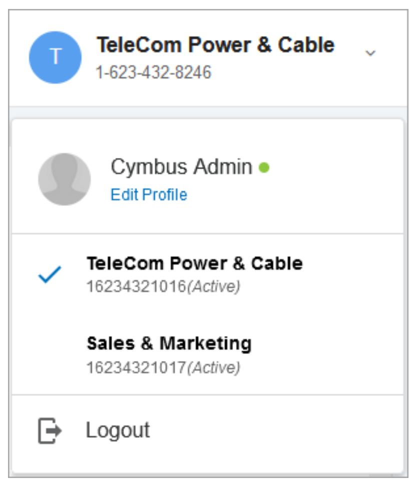
The menu is on the left side of the screen. Click the icon at the top to expand or collapse the menu. It will automatically collapse on smaller screens.

1. NEW MESSAGE. Send a new message to a new or existing contact.
2. MESSAGES. Send and receive messages to engage with your customers.
3. CONTACTS. Manage individual contacts and contact lists.
4. MESSAGE BOT. Set up Automatic and Intelligent Responses.
5. CAMPAIGNS. Schedule campaigns for target audiences.
6. REPORTS. Download a report of all messages sent for a specific period.
7. SETTINGS. Edit your profile, including your name, password, and email.
8. ADMIN. Access to users, SMS Numbers, Groups, and Company Info.
9. HELP. Have a question? Access the Support Center and FAQ here.
10. LOGOUT. You can log out here or from the Profile menu at the top right.

Profile

The active profile is displayed at the top right of the window. It shows the user who is currently logged in and the phone number they're currently texting from. This is especially helpful for users who share a computer.

To send messages from a different number on the account, expand the menu and select the phone number you want.



Before we get too involved in the details, let's get your account set up.

ADMIN SETUP

Users

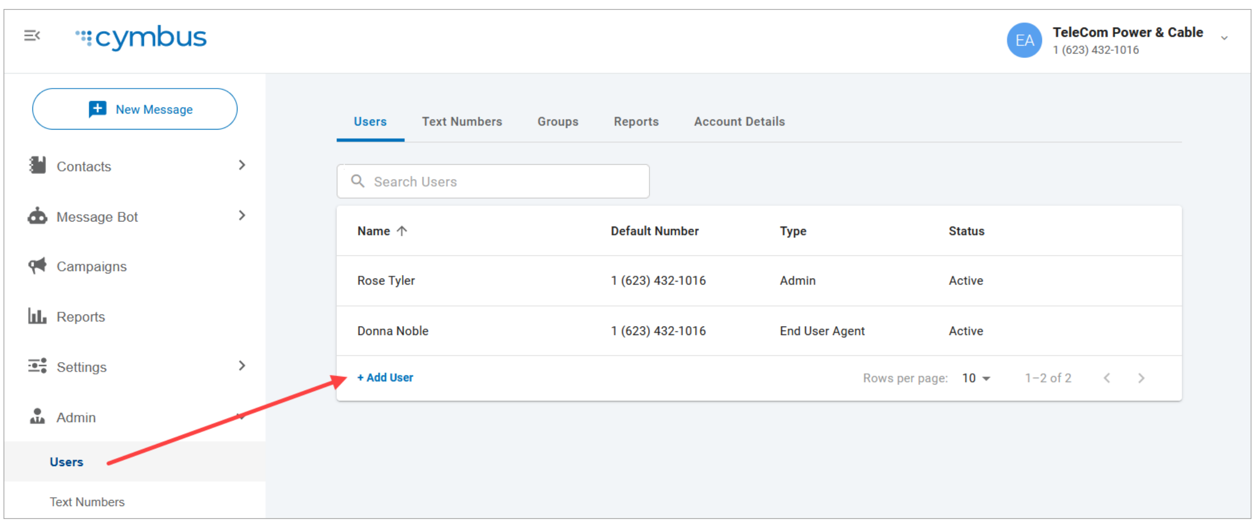
There are two types of Business Text Messaging users:

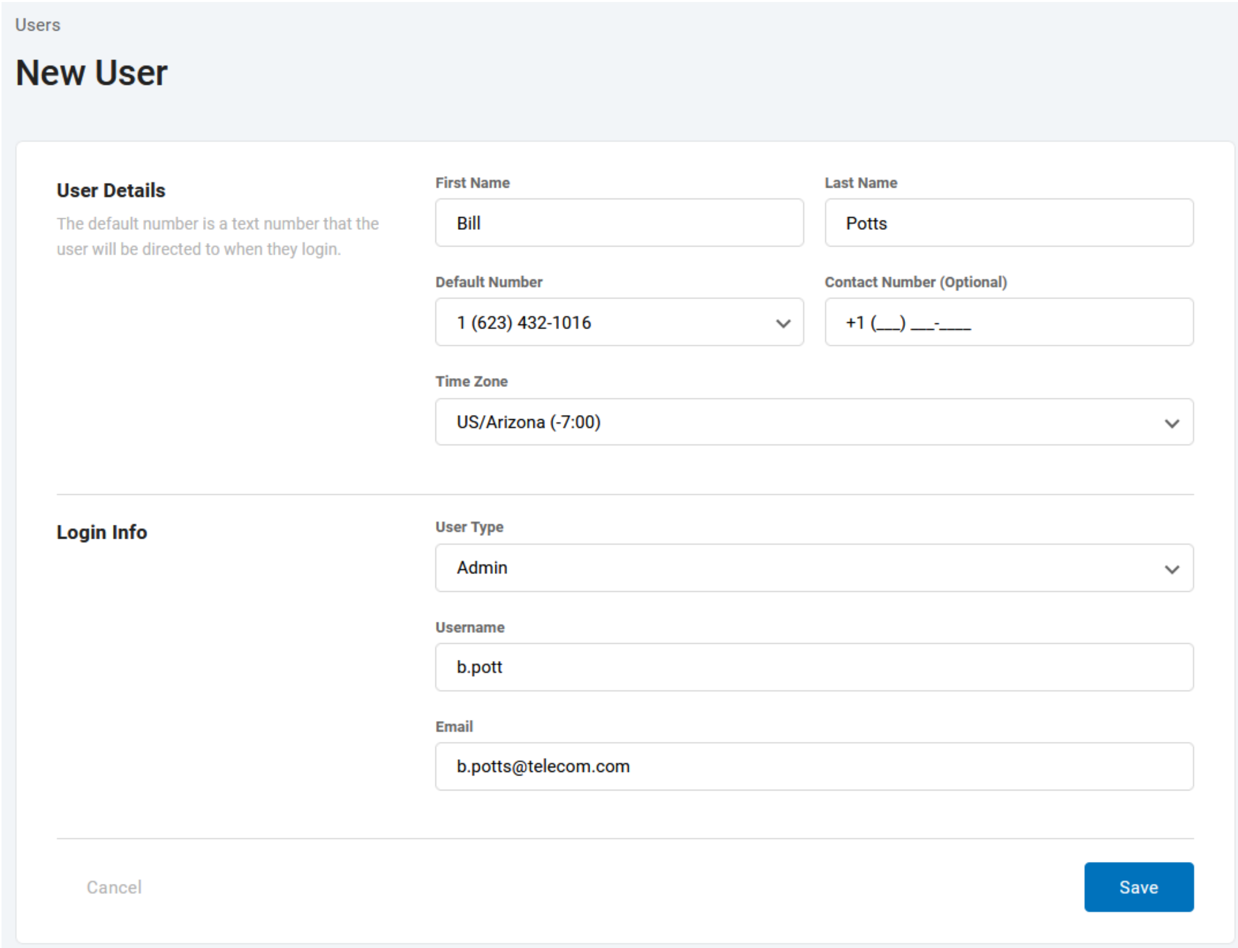
- END USERS can send and receive messages, manage contacts and campaigns, and download reports.
- ADMINS have additional access to add new users and SMS numbers, manage user profiles, create and assign users to groups, and update company information.

An Admin user was created when the account was set up. This user will be the first to log in and set up the account and add new users.

Add Users

1. Go to Admin > Users.
2. At the bottom of the user list, click *+ Add User*.





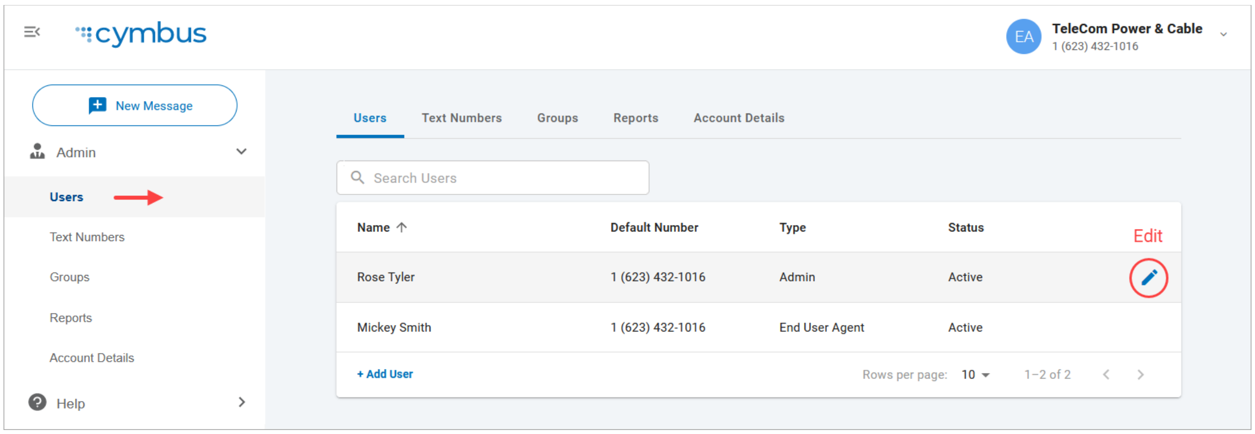
3. On the **New User** screen, enter the following information:

FEATURE	DESCRIPTION
Name	Enter the user's first and last names.
Default Number	Select the *default* SMS number the user will be texting from. The user can be assigned additional numbers later.
Contact Number	Enter the user's phone number (not the number they'll text from).
Time Zone	Select the user's local time zone.
User Type	Select their user type: Admin or End User.
Username	Enter the username they will use to log in to the Messaging Portal. Choose carefully; it *cannot* be changed later.
Email Address	The user's email address. This is where the *Forgot Username* and *Forgot Password* emails will be sent if the user has trouble logging in.

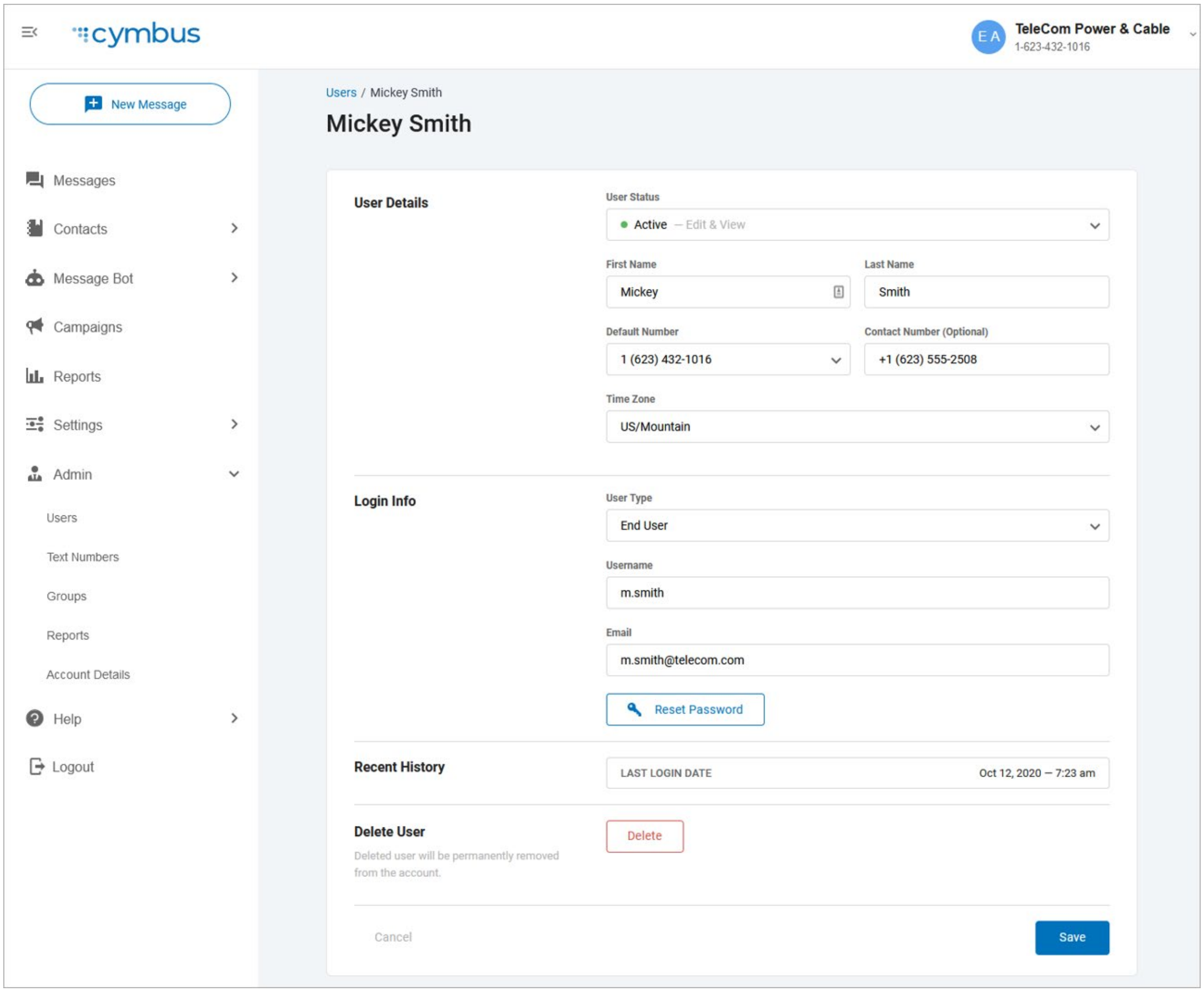
4. Click **[Save]**. A *Welcome* email will be sent to the new user with a link to create their login password. The account will be in *Pending* status until a password is created.

User Settings

Admin users can manage the settings for their End Users in **Admin > Users: Edit**.



Review and update the user's information as necessary, then click **[Save]**.



USER DETAILS

FEATURE	DESCRIPTION
User Status	The status of the user's account: Active or Disabled. If you change the status, it will be effective immediately once the page is saved.
First Name	The user's first name.
Last Name	The user's last name.
Default Number	Select the *default* SMS number the user will be texting from. The user can be assigned additional numbers later.
Contact Number	Enter the user's phone number (not the number they'll text from). It's optional but may be helpful if you need to get in touch with them later.
Time Zone	The user's local time zone.

LOGIN INFO

FEATURE	DESCRIPTION
User Type	Select their user type: • End Users can send and receive messages, manage contacts and campaigns, and download reports. • Admins have additional access to add new users and SMS numbers, manage user profiles, create and assign users to groups, and update company information.
Username	The username they use to log in to the Messaging Portal.
Email	The user's email address. This is where the *Forgot Username* and *Forgot Password* emails will be sent if they can't log in.
Reset Password	If a user forgets their password, they can request a reset link from the login screen, or an Admin can click [Reset Password] to request it for them. The password reset link will be sent to the user's email address.

RECENT HISTORY

This shows the last day and time this user logged in to the Messaging Portal.

DELETE USER

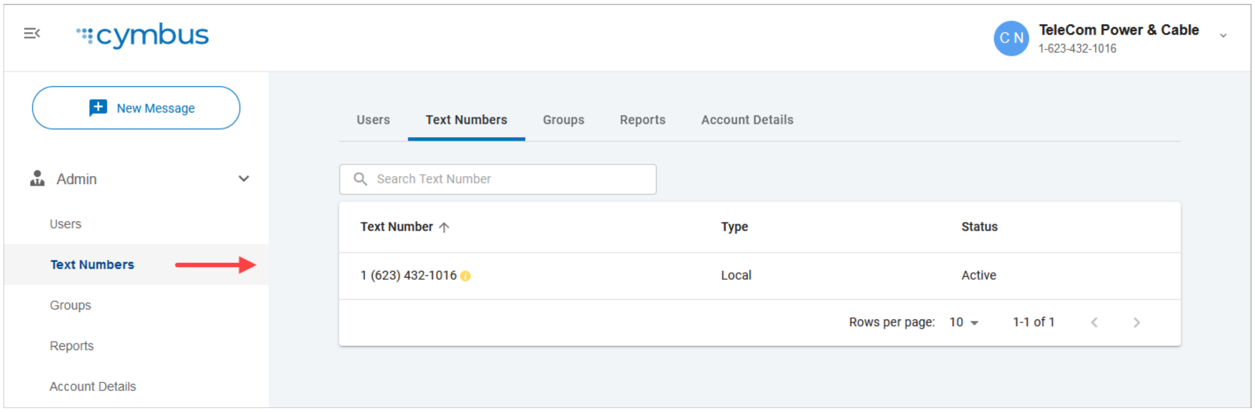
If a user has left the company or should otherwise not have access to Business Text Messaging, click [Delete] to remove them from the account. A warning message will ask if you're sure you want to permanently delete the user. If you do, click [Delete] again.

Upon deletion, the former user will be unable to log in or reset their password. Their message history will still be a part of the original conversations.

Text Numbers

In Admin > Text Numbers, you can see the phone numbers enabled for texting on this account, the phone number type (Local), and the state (Active, Pending Activation, Deactivated).

Your account was set up with a default phone number, but you aren't limited to just one. If your business needs more than one text-enabled phone number, contact your service provider for assistance.

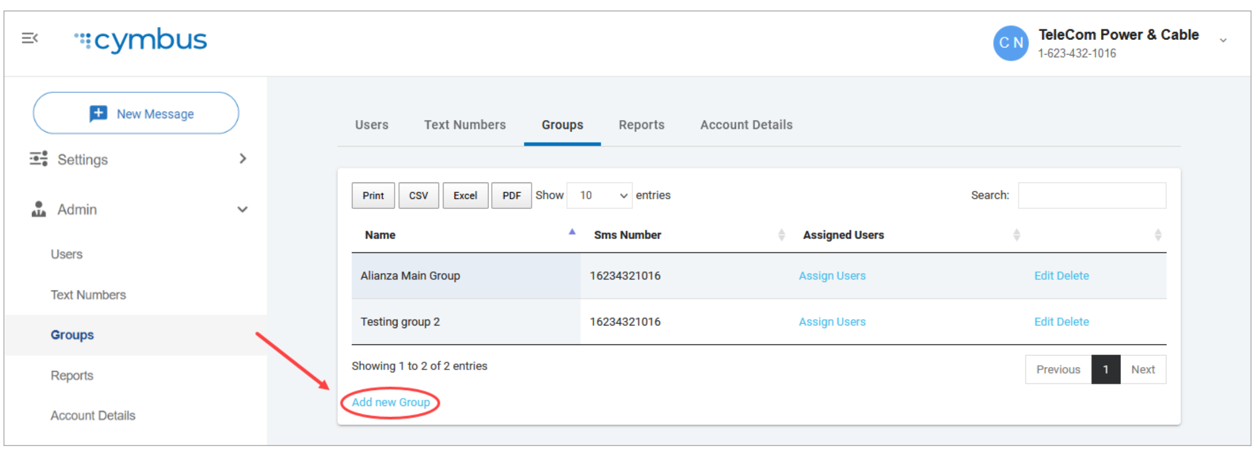


CAMPAIGN REGISTRY

Every account must be registered with the Campaign Registry, which validates your texts before they're sent on the network, so wireless carriers won't label your messages as spam. This usually happens when the account is created. However, if your registration is missing, there will be a yellow info icon next to the phone number asking you to contact your service provider for assistance.

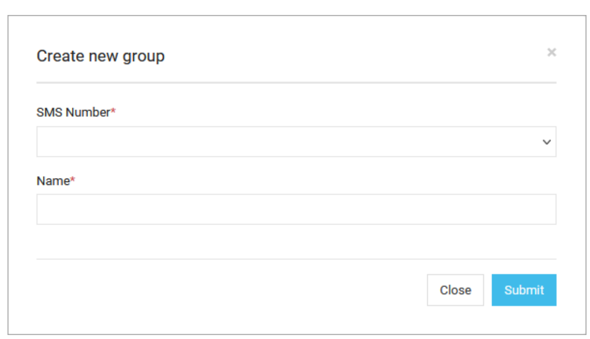
Groups

A group is composed of a company phone number and the users assigned to it. The name of the group is the name of the line. Each phone number is its own group, and users assigned to a group have access to its phone number's messaging inbox.



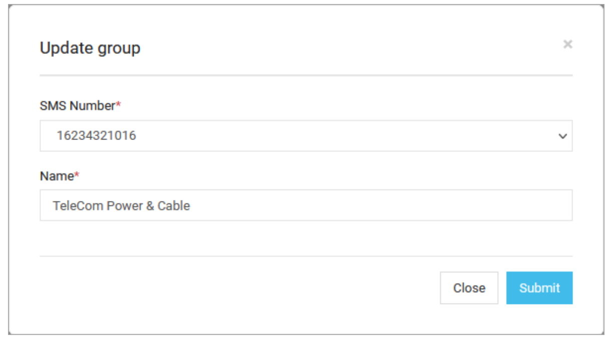
Add new Group

1. Go to Admin > Groups.
2. Click *Add new Group*.
3. Select an SMS number from the list.
4. Enter a unique name for the group.
5. Click **[Submit]**.



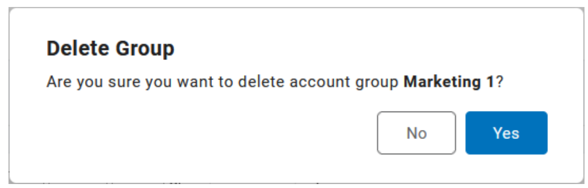
Update Group

To modify an existing group, locate the group and click *Edit* on the right. Make any changes as necessary to the SMS Number or Name, then click [Submit].



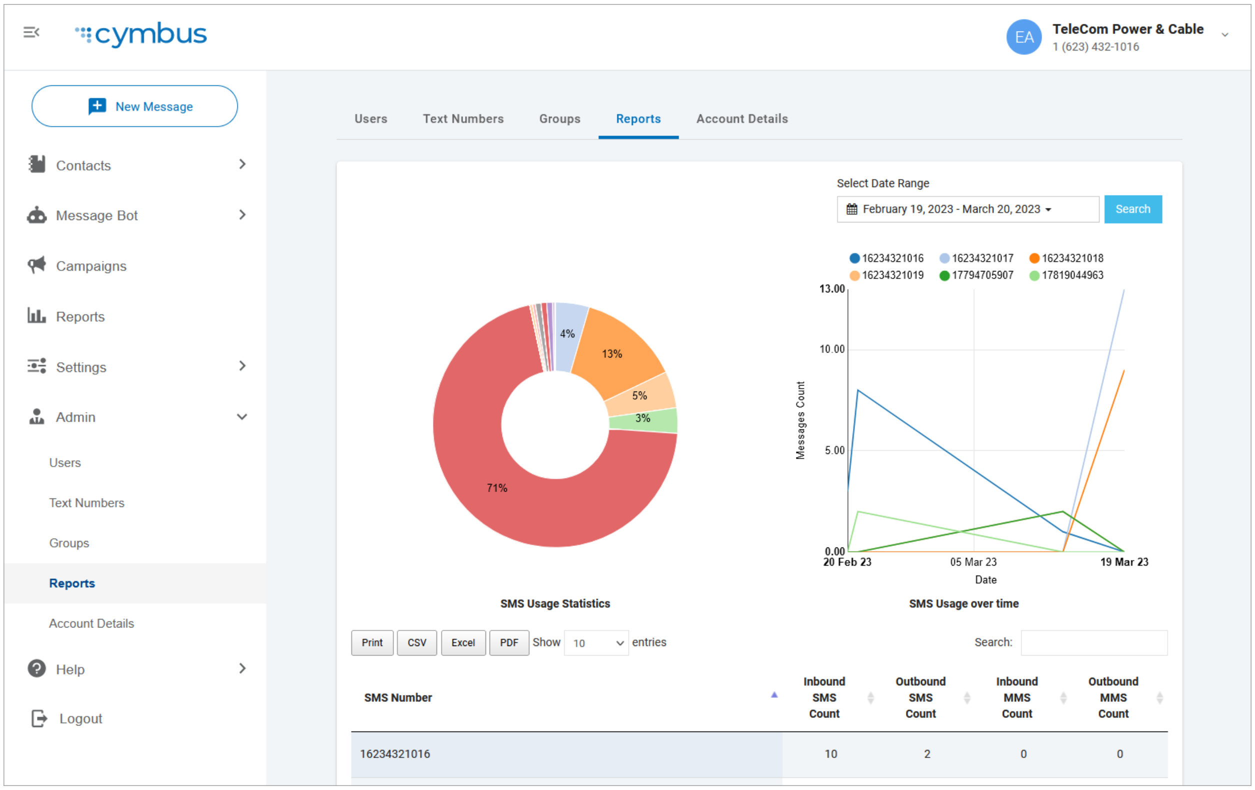
Delete Group

To delete an existing group, locate the group and click *Delete* on the right. Click [Yes] to confirm.



Reports

Reports show your inbound and outbound usage statistics in an easy-to-view graph and table formats. Select a date range in the top right corner and click **Search**. The results table can be printed or downloaded as a CSV, Excel file, or PDF for easy offline viewing.



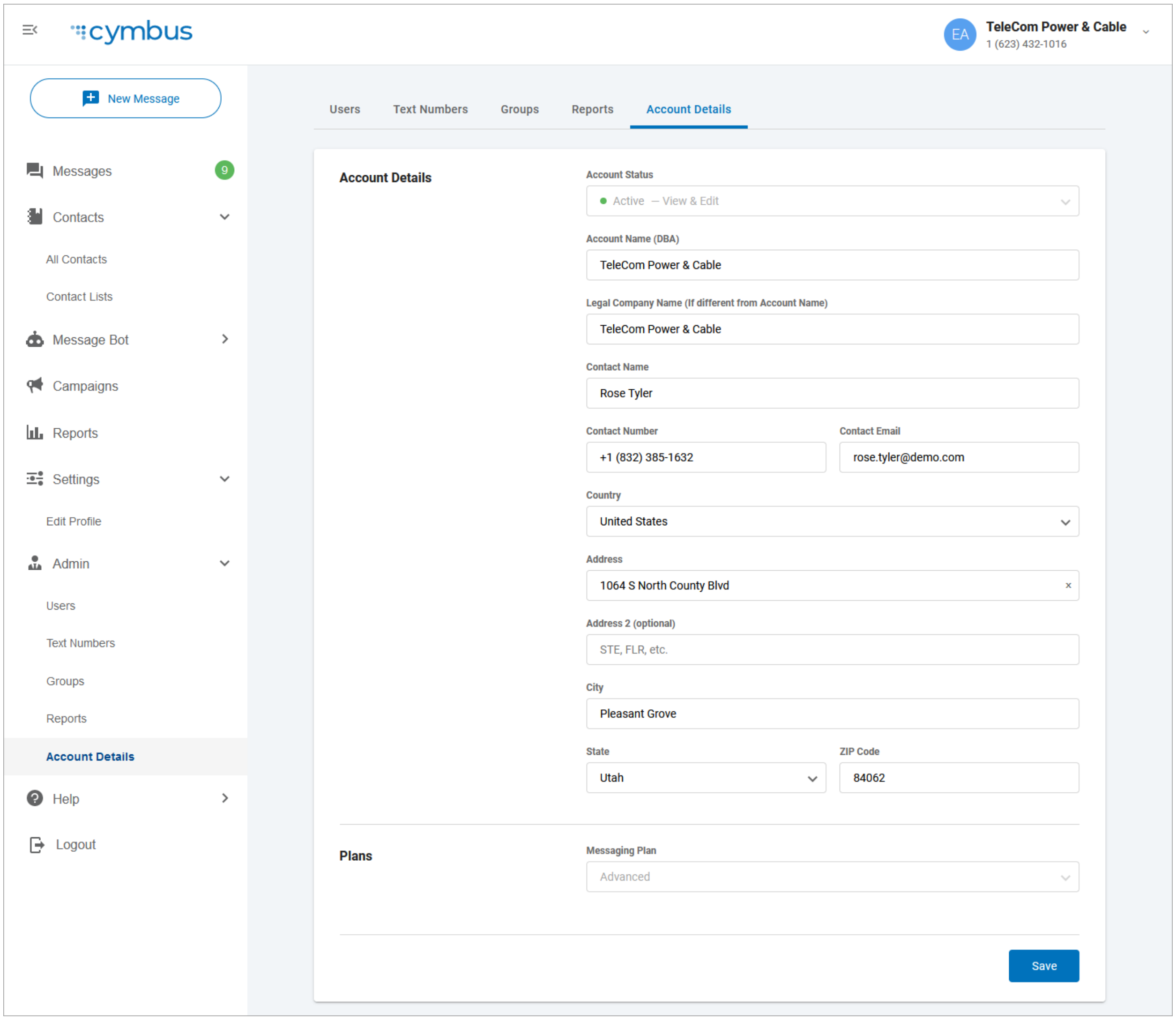
This is one of two places in the account to view usage statistics. In the primary Reports section, you can view more information and specify both a contact and a date range.

For more information, see Reports.

Account Details

Automatic responses and SMS campaigns rely on your company information, so make sure it's accurate. To change the Account Status or Messaging Plan, please contact your service provider.

Go to Admin > Company Info. Review the information and make any necessary changes, then click [Save].



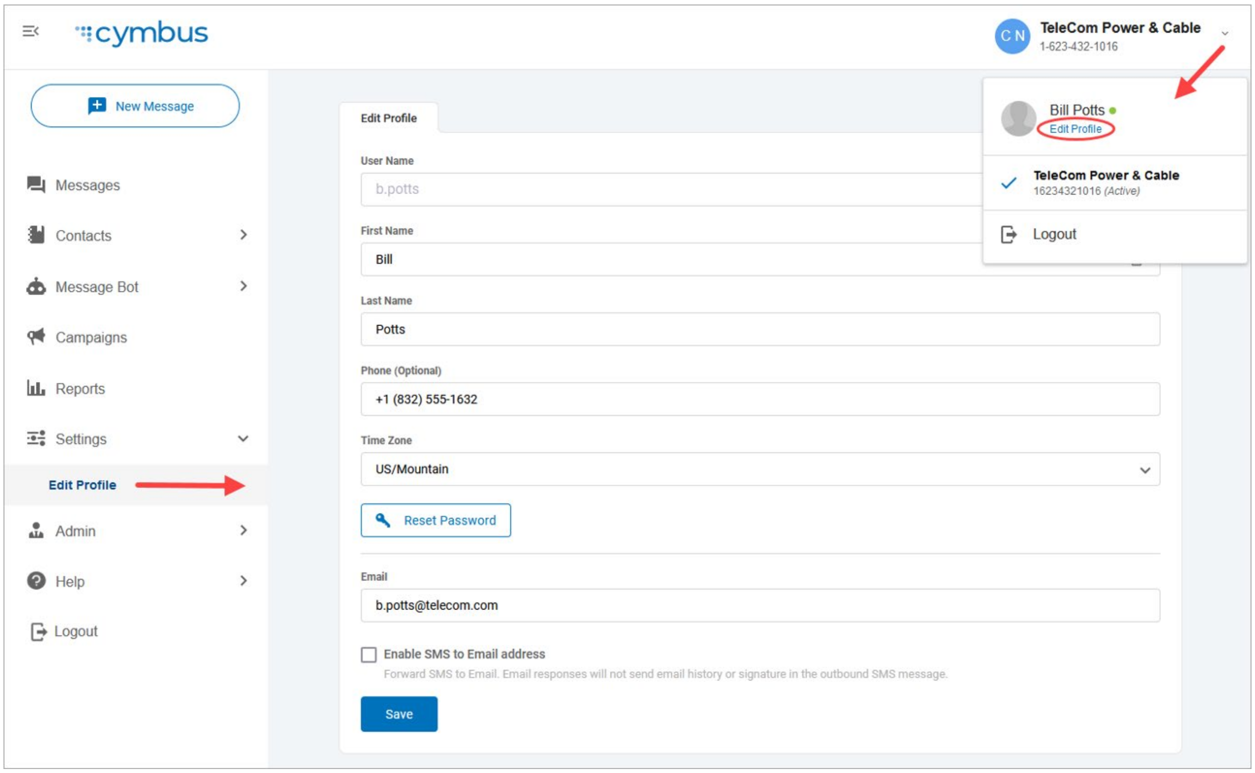
ACCOUNT DETAILS

- Account Status
- Account Name (DBA)
- Contact Name
- Contact Number
- Contact Email
- Country
- Address
- City, State, ZIP Code

SETTINGS

Edit Profile

You can manage your own profile in **Settings** or by expanding the profile menu on the top right and clicking *Edit Profile*.



Enable Text-to-Email

As a Business Text Messaging user, you can receive and reply to texts from your email. When you receive a text (SMS or MMS), a copy of the message will be forwarded to the email address associated with your profile. You can then reply to the message via email or the Messaging Portal, and the customer will receive the reply as a text.

You can enable or disable text-to-email in your user profile

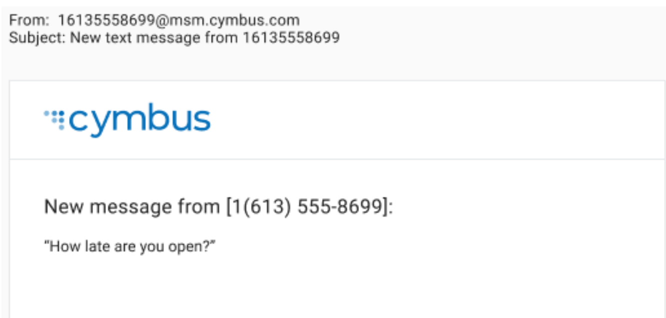
1. Go to **Settings > Edit Profile**.
2. Enter your email address if it isn't already listed.
3. Check "Enable SMS to Email address."
4. Click **[Save]**.

When enabled, incoming SMS and MMS messages that you can receive will be both posted in the Messaging Portal and forwarded to your email address. The From address is [contact's phone number]@msm.cymbus.com and the subject reads "New text message from [phone number]." MMS-compatible attachments will be included in the message, and emojis will render properly if they're compatible with the email provider.

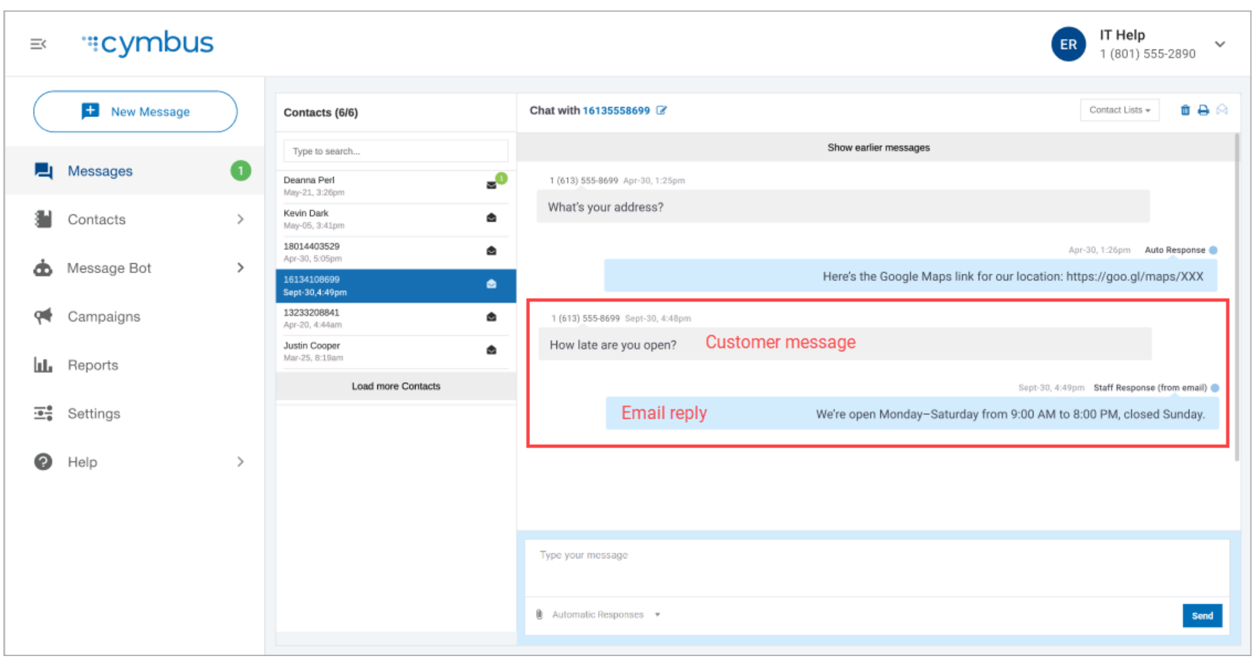
When you respond to the email, the message is sent back to the recipient via a text message (SMS or MMS). All messages will be documented and stored in the portal within the message thread (conversation) for that contact.

Email responses will include only one paragraph of text. Anything beyond the first paragraph will be removed from the message to ensure chat history and email signatures are not sent to the recipient.

INCOMING TEXT FORWARDED TO EMAIL



CONVERSATION IN THE MESSAGING PORTAL



SEND & RECEIVE MESSAGES

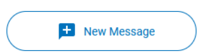
The Messages inbox is the main screen from which you'll read and respond to messages. From here, you can:

- See your most recent incoming messages and contacts.
- Update the name of the contact you're messaging in the chat toolbar.
- Know which team member, Auto Response, or Campaign sent any previous messages.
- Reply to incoming messages manually or click Auto Response to send a Response Message template.

SWITCH PHONE NUMBERS

The phone number you're texting from is indicated in the top right corner of the window next to your Profile icon. To switch to another phone number, click the drop-down menu and select the number you want.

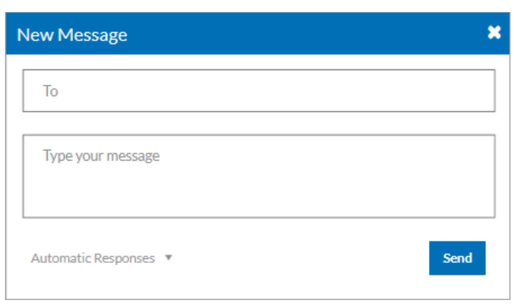
New Message

To send a new message, click the 

button above the navigation menu.

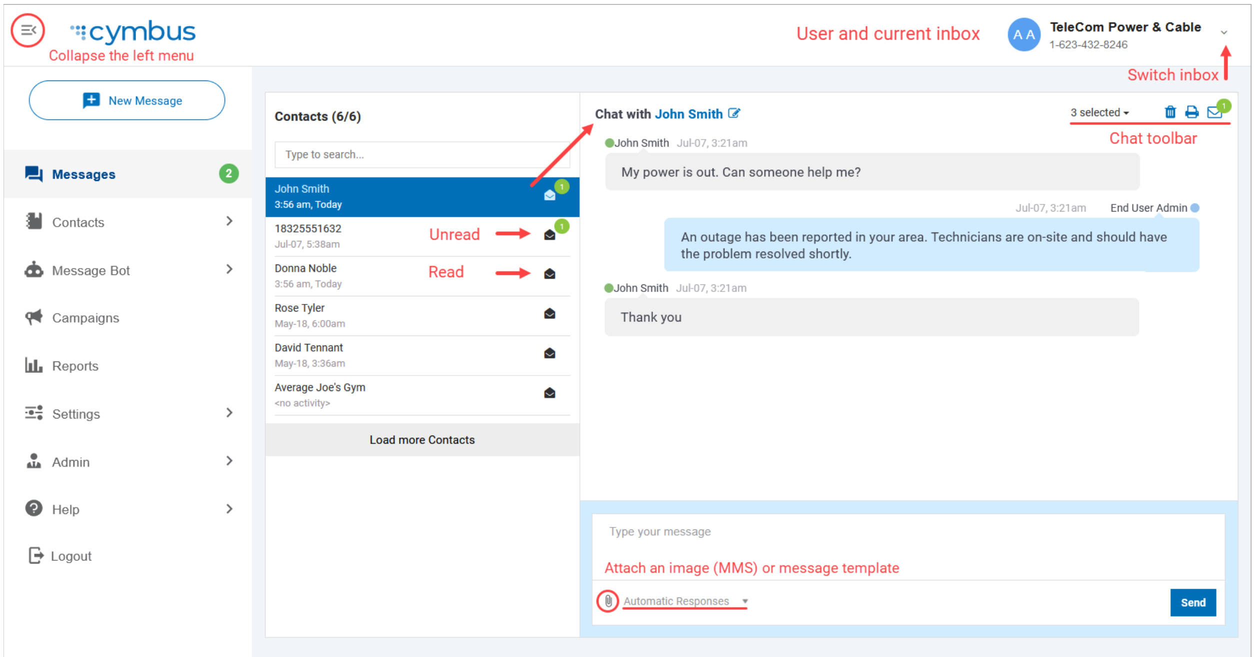
In the *To* field, start typing a name or phone number to filter the list, then select the right contact when their name comes up.

Next, compose your message or select *Automatic Responses* to insert a Response Message template, then press [Send].

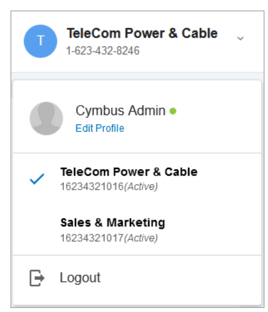


Messages Inbox

The Messages inbox displays the most recent conversations for the phone number you're currently viewing. Each phone number on the account has its own inbox. Expand the profile menu on the top right to see all the numbers you have access to and switch to another phone number inbox. If you manage multiple inboxes, you can open each one in a separate browser tab.



Active Profile



The inbox displays conversations from the phone number you're currently viewing, which you can see in the top right corner of the screen. To switch the phone number you're texting from, expand the drop-down menu and select a different number.

Contacts

Chats are listed by the contact's name (or phone number) in the order in which the messages were received. Up to 10 chats are displayed at a time, in the order in which the most recent message was received. Click *Load more Contacts* to view more.

The green icon on the **Messages** tab and the envelope icon in the Contacts list indicates the number of new messages in your inbox.

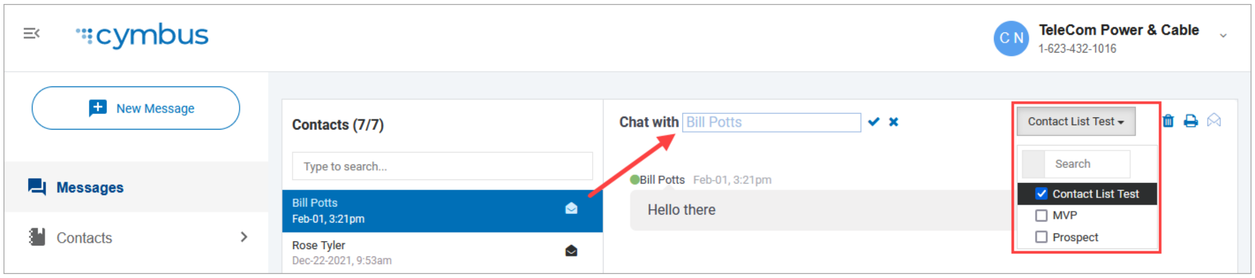
Select a contact from the list to open their chat window on the right.

Looking for a particular conversation? Start typing the customer's name or phone number in the *Type to search…* field, then select their name when it comes up. Results are listed by name, but you can hover over the name to see their phone number.

Chat Window

Toolbar

At the top of the chat window is a toolbar to manage the contact's details.

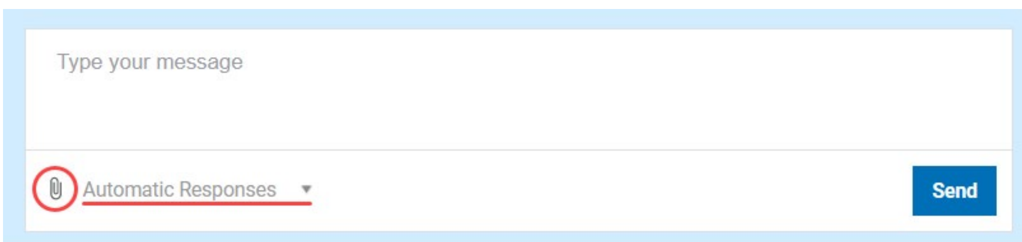


When a message from a new contact comes in, take the time to update their name and add them to the appropriate contact lists:

1. Click the pencil icon next to their name or number and type in the new information.
2. Then click the Contact Lists menu and assign them to the appropriate contact lists.

Reply

To reply to a message, type your response into the chat field, then hit [Enter] on your keyboard or tap [Send].



MULTIMEDIA MESSAGES (MMS)

Business Text Messaging supports multimedia messages (MMS). To attach a photo to your message, click the paperclip icon and select a file from your computer.

- Supported file formats include JPG, JPEG, PNG, and GIF.
- Video files are not supported at this time.
- Attached files must be less than 1 MB.

AUTOMATIC RESPONSE

Click *Automatic Response* to add a Response Message template to your reply. These are predefined message templates that can be used in a variety of ways in the Business Text Messaging application. Expand the menu to choose which message to send.

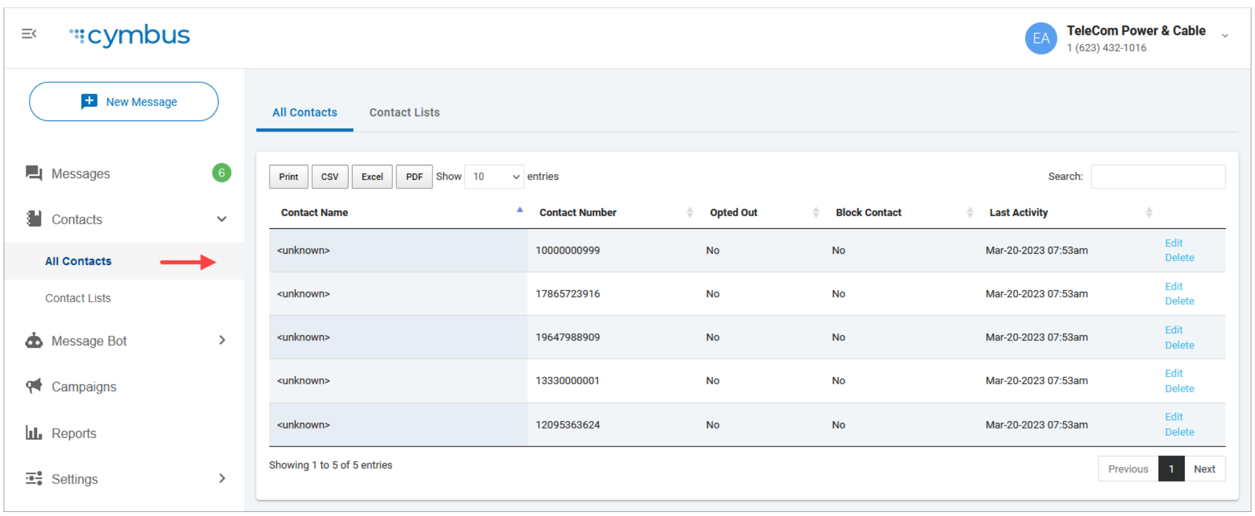
CONTACT MANAGEMENT

Business Text Messaging lets you easily create and maintain various contact lists for different user groups. One contact can be assigned to multiple lists, allowing you to segment your customers and send targeted campaigns.

Contact Lists are leveraged in other parts of the application. For example, when you create a campaign, you'll select which contact list to send it to.

All Contacts

All your Business Text Messaging contacts, including everyone that sends you a text message, is automatically added to the default *All Contacts* list. Contacts can be further sorted into other Contact Lists.



This table lists each contact on the account with their name (optional), phone number, opt-out status (Yes if opted out, No if opted in), blocked status (Yes or No), last activity date, and the **Edit** and **Delete** tools. Click Edit to modify any of these settings.

Add New Contact

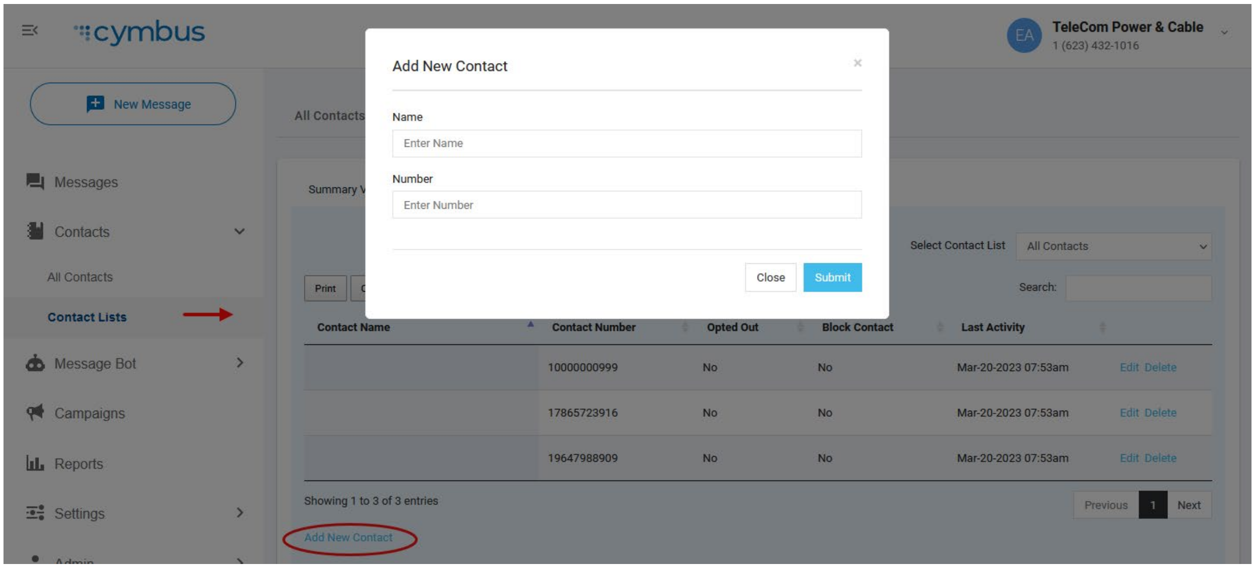
There are a few ways to add a new contact to Business Text Messaging:

NEW MESSAGE

When a message from a new contact is received, their phone number is automatically added to the default *All Contacts* list. Take the time to edit the contact's name directly in the chat window toolbar and then add them to the appropriate contact list(s).

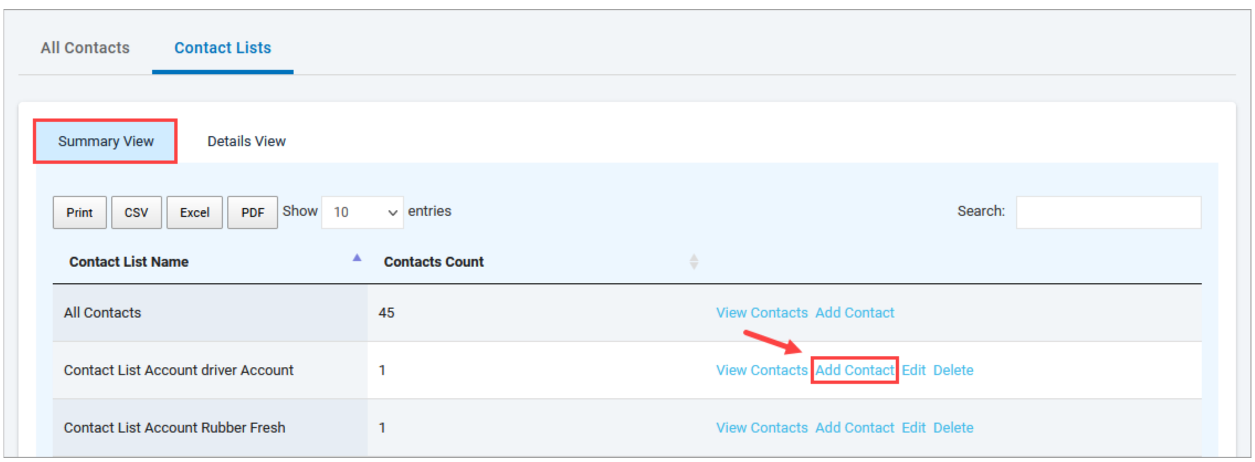
CONTACT LISTS: DETAILS VIEW

In **Contact Lists: Details View**, click *Add New Contact* on the bottom left of the screen. Enter the customer's name and phone number, then click **[Submit].**



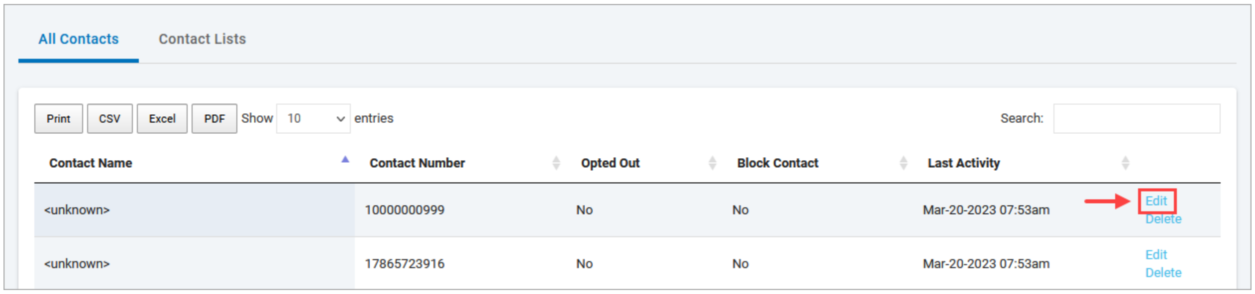
CONTACT LISTS: SUMMARY VIEW

In **Contact Lists: Summary View**, locate the list the contact will be added to, then click *Add Contact*.

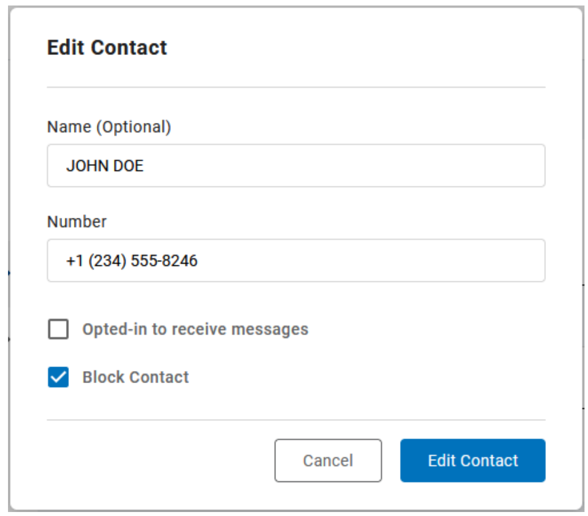


Edit Contact

Go to either the **All Contacts** tab or to **Contact Lists > Details View** and select the *All Contacts* list. Search for the contact and click *Edit* on the right.



In the *Edit Contact* window, add or enter the contact's name and phone number in the appropriate fields.



OPTED-IN TO RECEIVE MESSAGES

The *Opted-in* checkbox indicates whether the customer has elected to receive messages from this account.

- CHECKED. Contact has opted in, and messaging is enabled.
- UNCHECKED. Contact has opted out, and messaging is blocked.

> **WARNING**
>
> Do not change the contact's opt-in status without their express permission. See Best Practices and Managing Opt-Outs for more information.

BLOCK CONTACT

Users can block a contact (phone number) to prevent them from sending messages to the account. It's a great way to stop unwanted messages from clogging your inbox.

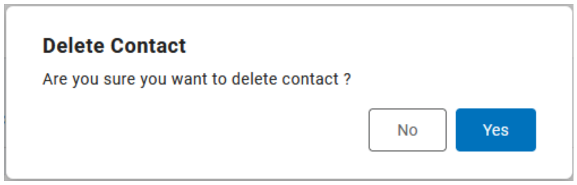
The *Block Contact* checkbox indicates if the contact is blocked:

- CHECKED. Contact is blocked. Contact cannot receive SMS/MMS messages sent from this account or send messages to this account.
- UNCHECKED. Contact is not blocked. Messages sent from the contact to the account will be received. If contact is also opted out of receiving messages, they can send a message to the account to opt back in.

When a contact is blocked, they are automatically opted out of messages. If a blocked contact requests (verbally or otherwise) to opt in to receive messages, they must be unblocked before the *Opted-in* box is checked.

Delete Contact

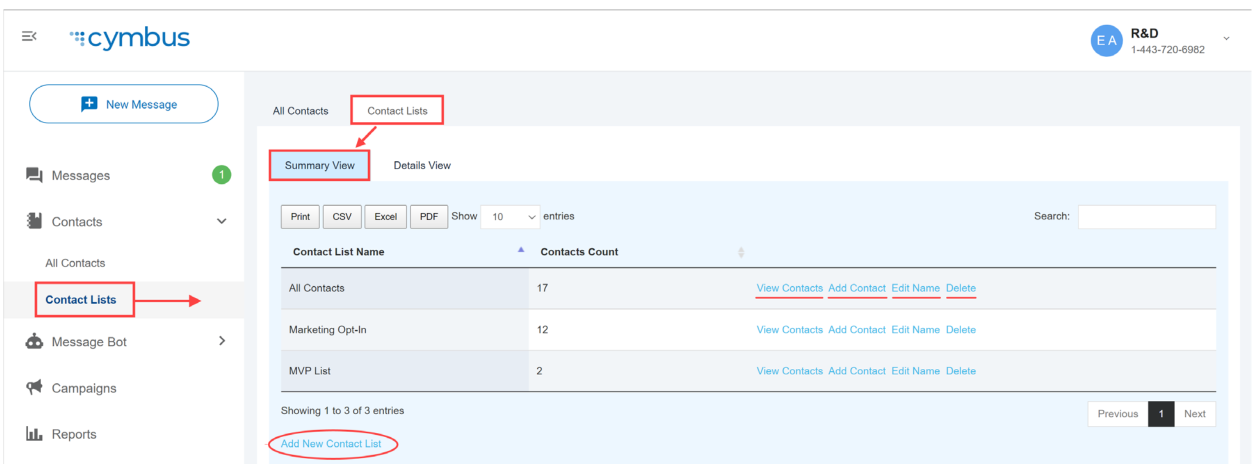
To permanently delete a contact from the system, search for the contact in the **All Contacts** tab, then click *Delete*. When asked if you really want to delete this record, click **[OK]** to confirm.



To remove a contact from a list, go to either **Contact Lists** tab and click *View Contacts* or **Details View** tab and open the contact list. Then locate the contact on the list and click *Delete*. The user is removed from the list but is still in the *All Contacts* list.

Contact Lists

Go to **Contacts > Contact Lists** to create and manage your contact lists. Everyone that sends you a text message is added to the default *All Contacts* list. Contacts can further be segmented into custom lists. Create as many or as few lists as you want!



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View Contact Lists

The **Summary View** tab shows the name of each list and the number of contacts assigned to it, while the **Details View** tab shows each contact assigned to the selected list. For each list, you can:

- VIEW CONTACTS. Jump to the **Details** tab to view a list of contacts assigned to this list.
- ADD CONTACT. Add a *new* contact to the list.
- EDIT NAME. Change the name of the contact list.

- **DELETE.** Permanently delete the contact list. Individual contacts will still be assigned to the *All Contacts* list.

Add New Contact List

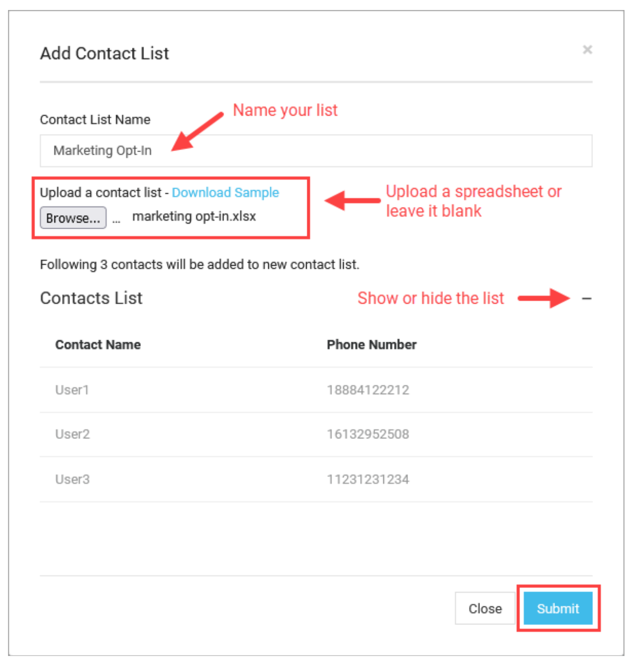
Contact lists can and should be created to segment you audiences for a variety of reasons. For compliance reasons, we recommend starting out with "Opted In" and "Opted Out" lists.

1. Go to Contacts > Summary View and click *Add New Contact List*.
2. Enter the following information:
   - **CONTACT LIST NAME.** Give your list a unique name, like Marketing, Sales, MVP, etc.
   - **UPLOAD A CONTACT LIST.** Upload a contact list (below) or skip this step to start with an empty list.
3. Click [Submit].

UPLOAD A CONTACT LIST

You can bulk upload an existing contact list from an Excel (XLSX) file with the contact's name in column A and their 10- or 11-digit phone number in column B. All contacts in the file will be added to the new list and the default All Contacts list.

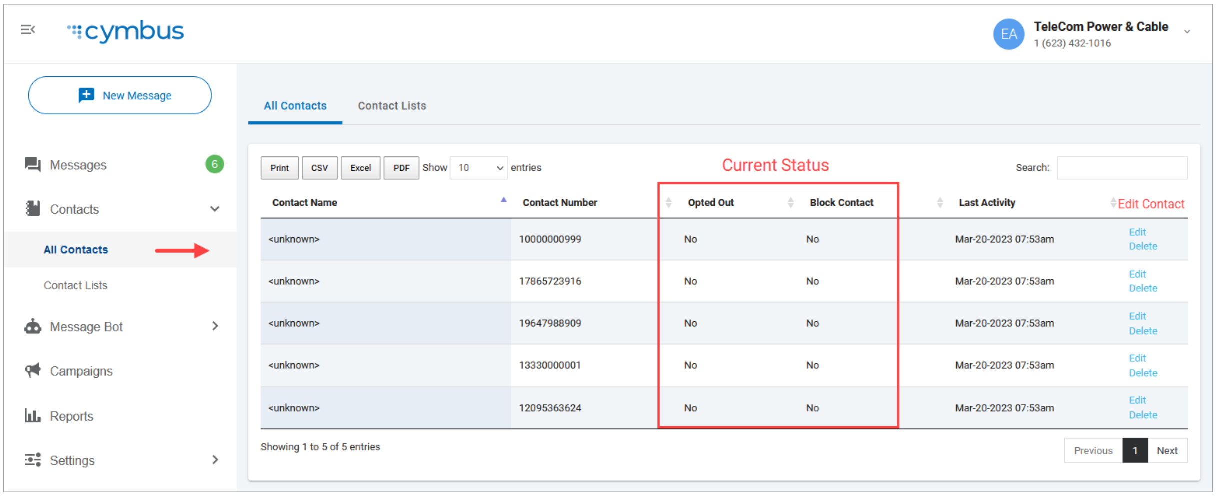
	A	B
1	**contact name**	**phone number**
2	User1	18884122212
3	User2	16132952508
4	User3	11231231234
5		



Managing Opt-Outs

When a contact sends "STOP," in any format, they are automatically opted out from all future messages from this account. If they send a new message to the account later, they will be automatically opted back in so you can reply. This feature cannot be disabled.

A contact's opt-in messaging status can be viewed in **Contacts > All Contacts** and **Contacts Lists > Details View**. To update the opt-in/opt-out status for a contact, click *Edit* on the right.



Manage Individual Contact Lists

Sometimes customers will still want to receive messages from one list but not another, so "STOP" isn't the best option. If you have multiple lists for different products or purposes, such as marketing messages and account notices, you will want to offer alternative opt-out options that can be managed manually.

With every marketing campaign, add an Intelligent Response trigger to allow the contact to opt out of marketing messages. For example:

- Reply HELP for help.
- Reply OPTOUT to unsubscribe.

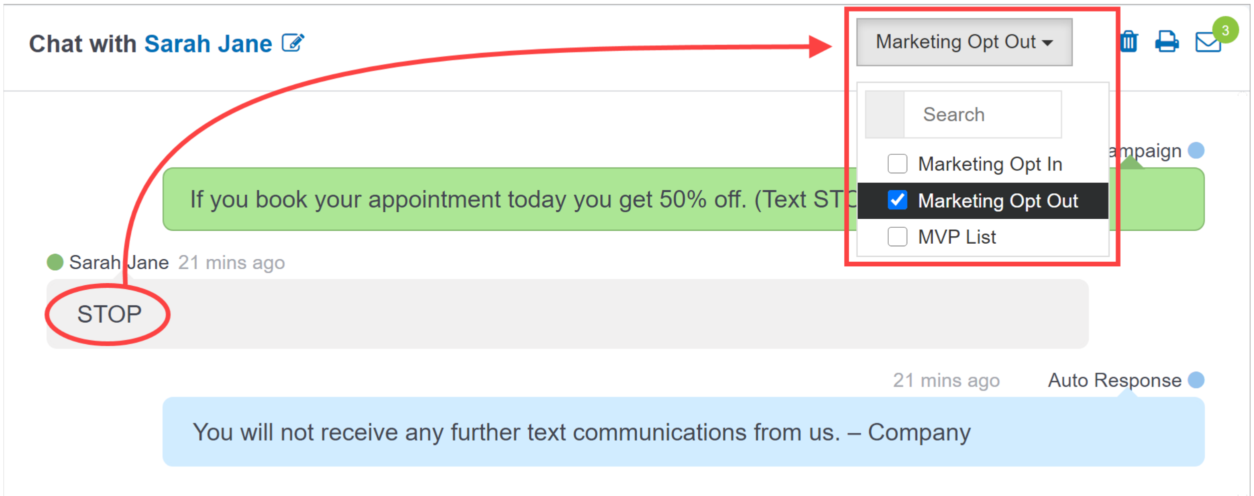
INTELLIGENT RESPONSES	
HELP	To opt out of marketing messages, reply OPTOUT. To no longer receive any communication from us, reply STOP. – Company
OPTOUT	You will not receive any further marketing messages from us. – Company

MANUAL REMOVAL

When an agent receives a message with a trigger word, they must *manually* remove that contact from that marketing list.

1. Click the Contact List drop-down menu.
2. Uncheck the list(s) they've asked to unsubscribe from
3. Check the "Opt Out" list (optional).

In this example, the Agent removed the customer from the "Marketing Opt In" list and added them to the "Marketing Opt Out" list. The contact will still receive 1:1 messages and campaign messages from any other lists they're subscribed to.



MESSAGE BOT

Message Bot helps to cut down on your non-productive phone and email requests with intelligent, automated responses to common topics. Time Schedules and Response Messages are the building blocks for Automatic and Intelligent Responses.

- Time Schedules. Set up the times when an Automatic Response is sent. For example, send one message when you're closed and another during your lunch break.
- Response Messages. These are the responses that are during a specific time (Automatic Response), when a keyword is received (Intelligent Response). They can also be used in new messages or when replying to a message.
- Automatic Responses. The message that will be sent when a message is received at a specific time (Time Schedule).
- Intelligent Responses. The keywords in an incoming message that trigger a particular Response Message to be sent.

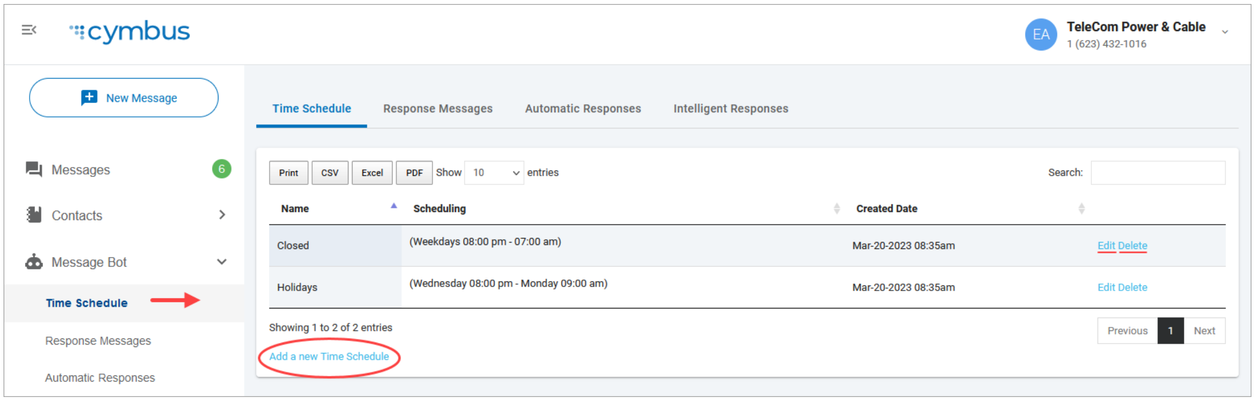
Management Tools

Links for each section are in the navigation menu on the left and at the top of the page for easy navigation. Each page has a toolbar to manage the list.

- Download. Printed or downloaded as a CSV, XLXS, or PDF.
- Show More. Choose how many entries to show per page: 10, 25, 50, 100.
- Search. Use the Search bar on the right to filter the list and find a specific message.
- Sort. Click on the table headings to sort the table. For example, on Response Messages, you can sort by Name, Message, or Created Date.

Time Schedules

Do you close for the lunch hour or leave early on Fridays? Set up a Time Schedule. These will be used later to specify when individual Automatic and Intelligent Responses will be sent.

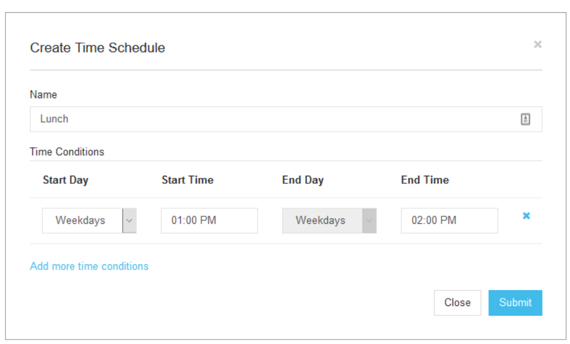


Links to **Edit** and **Delete** a schedule are on the right.

Add Time Schedule

1. Go to Message Bot > Time Schedule.
2. Click *Add a new Time Schedule*.
3. Enter a name to identify this schedule.
4. Click *Add more time conditions*.
5. Choose the start/end days (every day, weekdays, or a specific day of the week) and start/end times.

If the Start Day is set to “Every Day” or “Weekdays,” the End Day will be the same. If a schedule begins on a specific day of the week, you will also choose which day of the week the schedule will end.

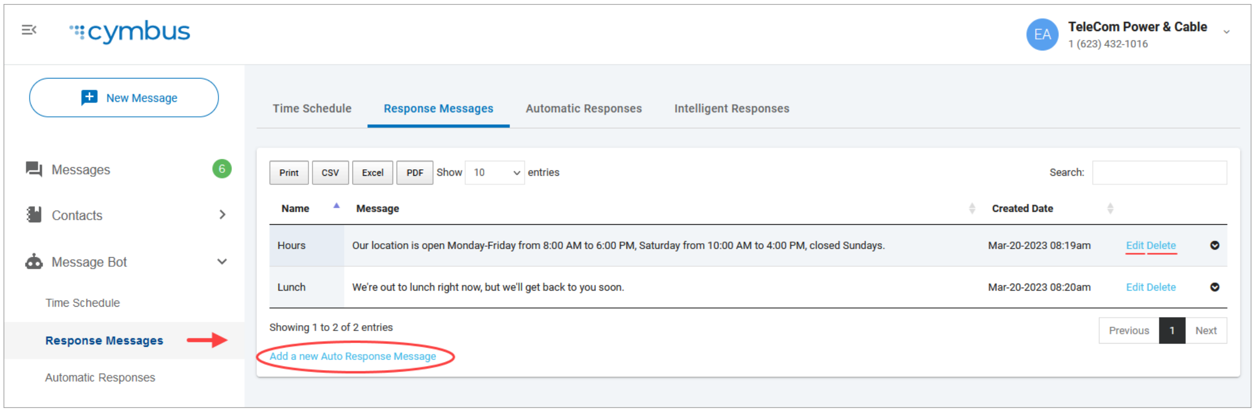


SCHEDULING

Time Schedules can be set for a specific day of the week, but not for a specific *date*. So, wait to apply it to an Automatic Response until you’re ready!

Response Messages

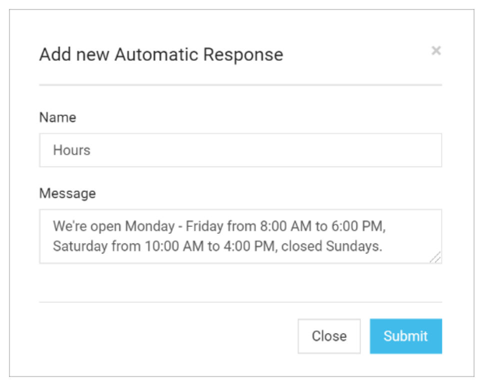
Response Messages are preconfigured texts that are used throughout the application—every Automatic Response and Intelligent Response requires a Response Message. Think of this section as your automatic response library.



Links to **Edit** and **Delete** an individual message are to the right. Please note, the message title cannot be changed.

Add New Response Message

1. Go to Message Bot > Response Messages.
2. Click *Add a new Auto Response Message*.
3. Give it a simple name.
4. Type in your message, up to 160 characters.
5. Click **[Submit]**.



Quick Response Templates

Response Messages can be used for more than just automation. They can simplify your workflows by giving you templates for common messages that you send to customers. These could be templates for appointment reminders,

When sending a new message or replying to an existing message, you can select *Automatic Response* to insert a Response Message template.

The message can be edited before sending, allowing you to build in some spots for customization.

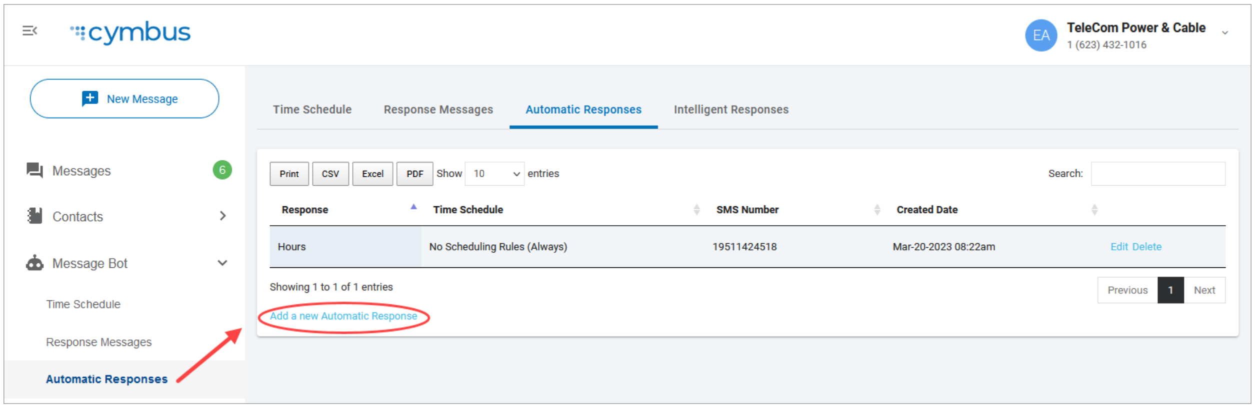
Examples

Here are a few examples of ways you might use Response Messages.

PURPOSE	MESSAGE
Reminders	Sterling has an appt w/Dr. Clayton on Tue 12/17 @ 10:00. Reply YES to confirm or NO to reschedule. Callback# 800-123-4567
Delivery Notice	Thanks for your order! All or part of your order CODE has shipped on 8-17-2020. Your tracking number is #NUMBER. Track your order here: URL
Booking	Thank you for booking with Island Vacation Rentals! Your booking number is: #NUMBER. We look forward to your visit!
Hours	We're open Monday-Saturday from 9:00 AM to 8:00 PM, closed Sunday.
Location	Here's the Google Maps link for our location: https://goo.gl/maps/XXX
Opt In	Welcome! You have opted in to receive sales and promotional communications from STORE. Reply "OPT OUT" to cancel.
Opt Out	You are now unsubscribed from any notifications from Lawn and Garden. We won't send you any more messages, except when you message us.

Automatic Responses

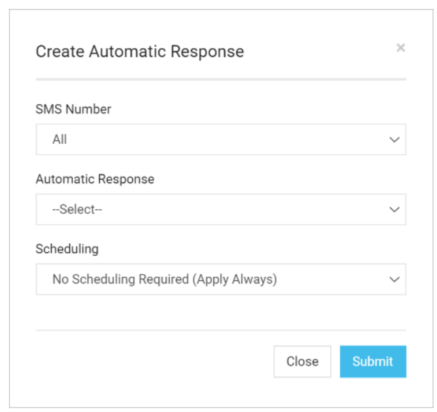
Response Messages and Time Schedules are used in combination to create Automatic Responses. Automatic Responses are sent during the specified schedule in reply to incoming messages to the specified phone number.



Create Automatic Response

Automatic responses are shared across all numbers on the account, so make sure to specify which number the response should be applied to.

1. Go to Message Bot > Automatic Responses.
2. Click *Add a new Auto Response Message*.
3. Enter the following information:
   - SMS Number. The phone number the response is applied to.
   - Automatic Response. The Response Message that is sent.
   - Scheduling. The Time Schedule during which this response is sent.

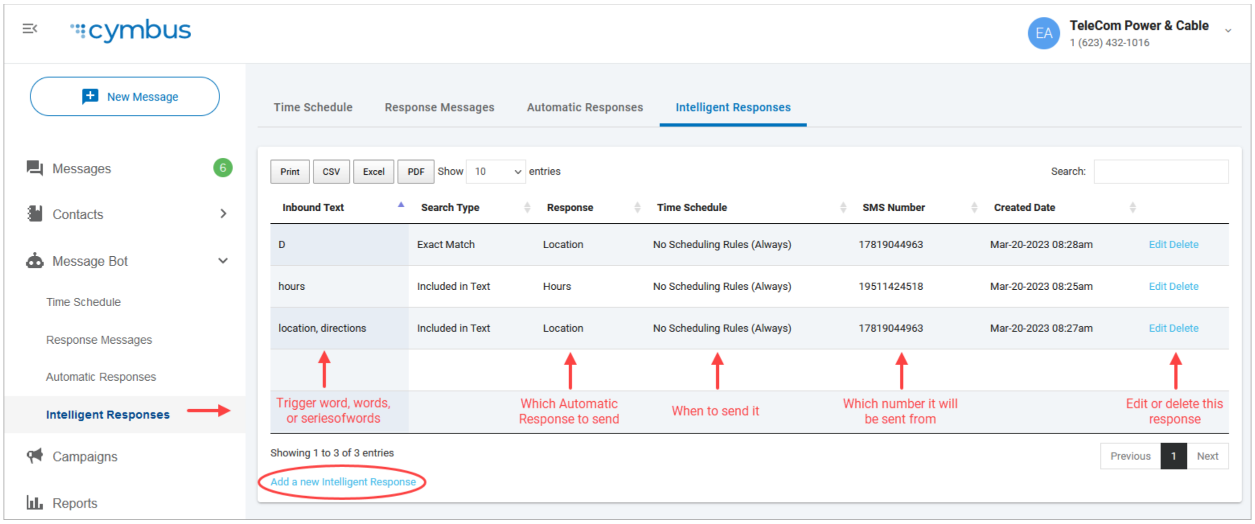


NO SCHEDULING REQUIRED (APPLY ALWAYS)

This option means this automatic response will be sent in reply to ALL incoming messages to the phone number specified on the response.

Intelligent Responses

Intelligent Responses are the words that trigger an Automatic Response to be sent. Entries are listed alphabetically by text trigger.



New Intelligent Response

1. Go to Message Bot > Intelligent Responses.
2. Click *Add a new Intelligent Response*.
3. Enter the following information:
   - TYPE. Choose if the inbound text trigger must be an exact match or if it can be included as part of the text message.
   - INBOUND TEXT. The word or words that trigger this response, without any special characters. Be as specific or vague as needed to make sure the correct response is sent. To finish one keyword and add another one, type a comma, hit Tab, or hit Enter.
   - INTELLIGENT RESPONSE. The Response Message that is sent.
   - SMS NUMBER. The phone number this response is applied to.
   - SCHEDULING. The schedule that determines *when* the message is sent.

Business Text Messaging will **ignore special characters** that a customer might send in a message. Just make sure the *Inbound Text* you enter here doesn't have any.

- **opt in** = optin, opt in, opt-in, OPTIN, OPT IN, etc.
- **im interested** = I'm Interested, I'm interested, im interested, I'm interested!

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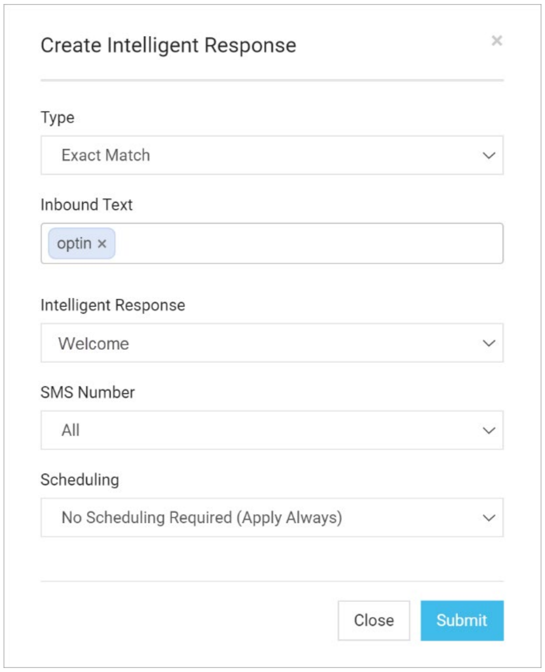
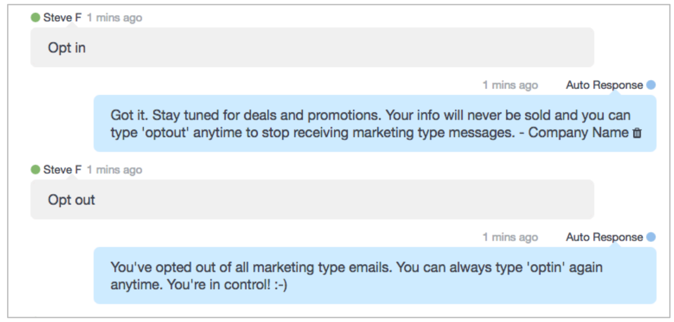
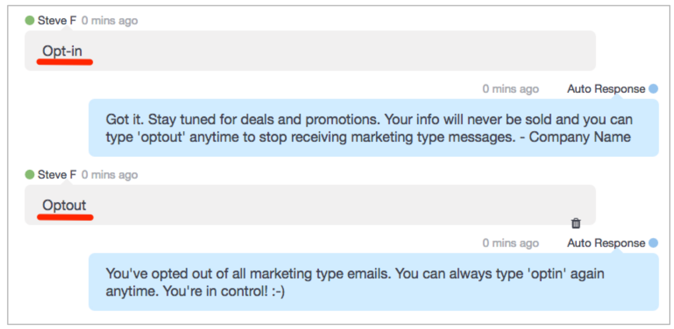
Here's what it looks like:







Examples

Every business is unique, but here are a few examples to help you think about the Intelligent Responses that might be helpful: –

TRIGGER	RESPONSE	MESSAGE
optin	Marketing Opt In	Thanks for signing up! Here's your coupon: LINK
optout	Marketing Opt Out	You've opted out of all marketing messages.
address, directions, located	Location	Here's the Google Maps link for our location: https://goo.gl/maps/XXX
appointment, appointments	Appointment Request	To schedule an appointment, give us a call at
hours open, when open, what hours	Business Hours	We're open Monday-Saturday from 9:00 AM to 8:00 PM, closed Sunday.
D	Location	Here's the Google Maps link for our location:
Y	Confirmed	Your appointment is confirmed!

Use Cases

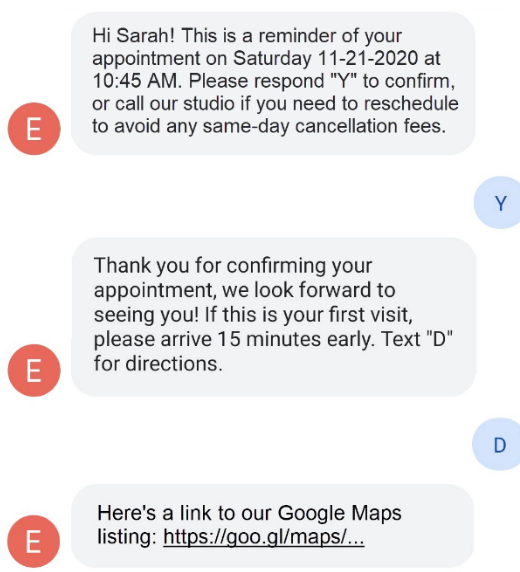
Appointment Reminders

A physical therapy studio sends reminders 24 hours prior to each appointment so they don't have to call everyone individually. A time schedule isn't necessary here because the message will be sent to each client manually.

Here's how they set it up:

RESPONSE MESSAGE	
Reminder	Hi Sarah! This is a reminder of your appointment on Saturday 11-21-2020 at 10:45 AM. Please respond "Y" to confirm or call our studio if you need to reschedule to avoid any same-day cancellation fees.
INTELLIGENT RESPONSES	
Trigger: Y	Thank you for confirming your appointment. We look forward to seeing you! If this is your first visit, please arrive 15 minutes early. Text "D" for directions.
Trigger: D	Here's a link to our Google Maps listing: https://goo.gl/maps/

When a customer responds Y, Business Text Messaging sends a confirmation text, and your staff confirms the appointment in the booking system. Here's what it looks like to the customer:



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Closing for the Holiday

The winter holidays are coming up, and Precious Pets Grooming will be closed for a few days. They receive a lot of texts during the day, and they want to let their customers know they'll respond when they get back.

The message they need to convey is the same for both holidays, but the days they want the message to send are different. Here's how they set it up:

TIME SCHEDULE	
Christmas	**Start:** Wednesday at 8:00 PM **End:** Monday at 12:00 AM
New Year	**Start:** Thursday at 8:00 PM **End:** Monday at 12:00 AM

RESPONSE MESSAGE	
Holiday	Precious Pets Grooming is closed for a few days so we can spend time with family and friends. We'll respond to your message as soon as we can when we reopen on Monday. Happy holidays!

INTELLIGENT RESPONSES	
Christmas	**Automatic Response:** Holiday **Scheduling:** Christmas
New Year	**Automatic Response:** Holiday **Scheduling:** New Year

Here's what it looks like to the customer:

Thursday, Dec 24 - 11:00 AM

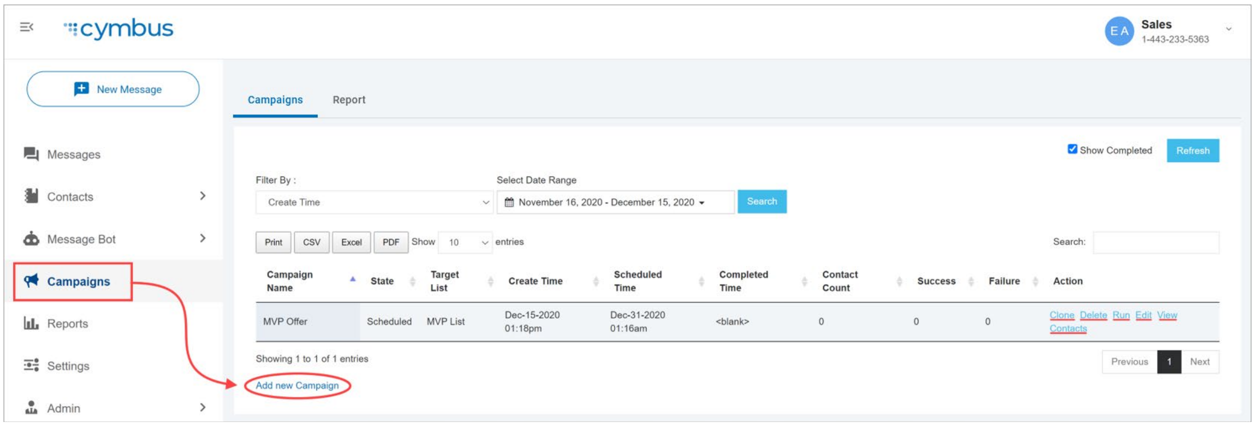
Any chance you have any openings tomorrow? My dog really needs a bath.

P

Precious Pets Grooming is closed for a few days so we can spend time with family and friends. We'll respond to your message as soon as we can when we reopen on Monday. Happy holidays!

CAMPAIGNS

Campaigns are a great way to market your business to existing customers and prospects alike. Promote sales and events, send updates, and more.



The Campaign list can be filtered by Create Time, Completed Time, and Scheduled Time. Next to the filter, you can further narrow the list by date range. At the top right, choose to show or not show completed campaigns in the list.

ACTIONS

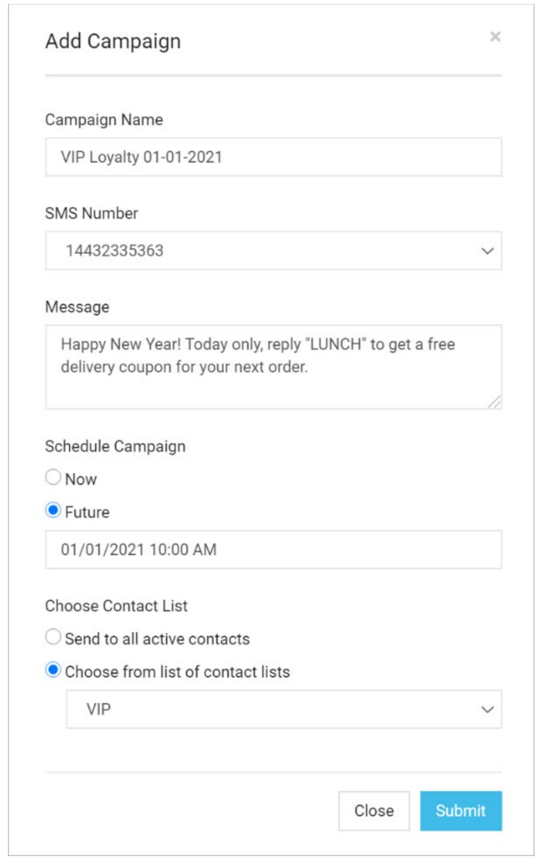
Each campaign is listed on the main page with basic details, including successes (received) and failures (not received). The Action field on the right gives you tools to manage the campaign.

Campaign Name	State	Target List	Create Time	Scheduled Time	Completed Time	Contact Count	Success	Failure	Action
MVP Offer	Scheduled	MVP List	Dec-15-2020 01:18pm	Dec-31-2020 01:16am	<blank>	0	0	0	Clone Delete Run Edit View Contacts

- **CLONE.** Duplicate this campaign to edit some details and use it again.
- **DELETE.** Permanently delete this campaign.
- **RUN.** Send this campaign immediately, rather than waiting for the scheduled time.
- **EDIT.** Update the name, SMS number, message, schedule, or contact list.
- **VIEW CONTACTS.** View the contacts this campaign will be or was sent to.

Add New Campaign

1. Go to Campaigns and click *Add new Campaign*.
2. Enter the following information:
   - CAMPAIGN NAME. Give it a name.
   - SMS NUMBER. Choose the number the campaign message is sent from.
   - MESSAGE. Enter a message.
   - SCHEDULE CAMPAIGN. Choose to send it now or schedule it to send later.
   - CHOOSE CONTACT LIST. Send to all contacts or an individual contact list.
3. Click **[Submit]**.



ADD CONTACT'S NAME

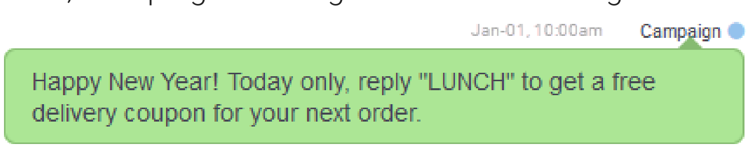
Use variables to personalize the message by adding the contact's name:

- {firstname} — The contact's first name, before any spaces
- {name} — The contact's full name as entered

See Edit Contact to modify the contact's name.

Sent

In the Messages inbox, Campaign messages are indicated in green.



Examples

PURPOSE	MESSAGE
Subscribe	Be the first to know about discounts and offers! Reply "SUBSCRIBE" to subscribe. For more deals, visit STORE.com/coupons.
Cross-Sell	Thanks for purchasing ITEM! Here's 20% off our OTHER ITEM, because we think you'd love them too. Discount is only available for a week, so check them out here: URL
Promotions	We're having a Buy 3 Get 1 Free tire sale until the end of July. Visit Joe's Auto Repair today on 21st Street for sizes and prices.
Loyalty Program	Today only, reply "LUNCH" to get free delivery coupon for your next order!
Events	Keep the kids happy this summer with a free game of laser tag. To book your game, reply "SCHEDULE" or give us a call at 555-454-7777.
Updates	No more running out of the office at 4pm on Fridays to find a new dress! Sarah's Closet is now open until 8pm. Find your closest store: sarah.com/stores.
Coupon	Here's your coupon for use at any of our Lawn and Garden locations: COUPON. To opt out of these messages, reply STOP.
Webinar	Hey, it's Lisa from SPS! Are you coming to the "Ask Me Anything" live training we're having this evening? Tap the link to reserve your spot! URL
Survey	Seaside Medical would like your feedback about your recent visit: URL Text STOP to stop.

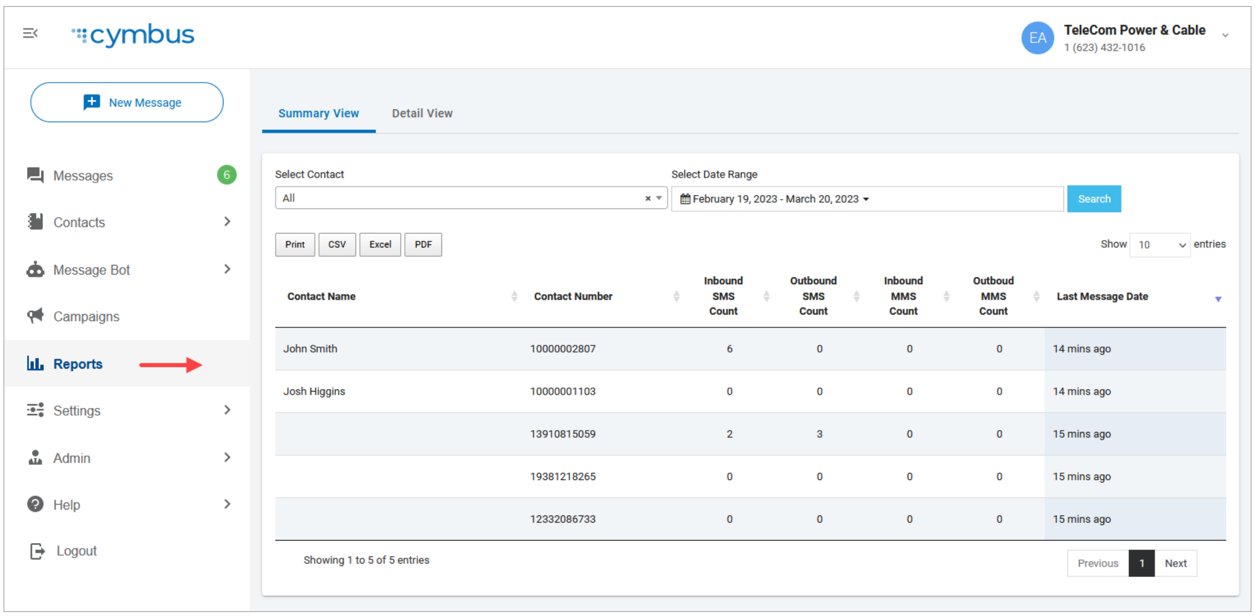
REPORTS

Reports show your inbound and outbound usage statistics in an easy-to-view table format. Select a date range in the top right corner and click **Search**. The results table can be printed or downloaded as a CSV, Excel file, or PDF for easy offline viewing.

Summary View

The **Summary View** tab lists each contact with their phone number, inbound and outbound message counts, and the date of the last message (sent or received).

Using the drop-down menus at the top of the tab, select a contact or all contacts, choose a date range, then press **[Search]**. The results are displayed below.

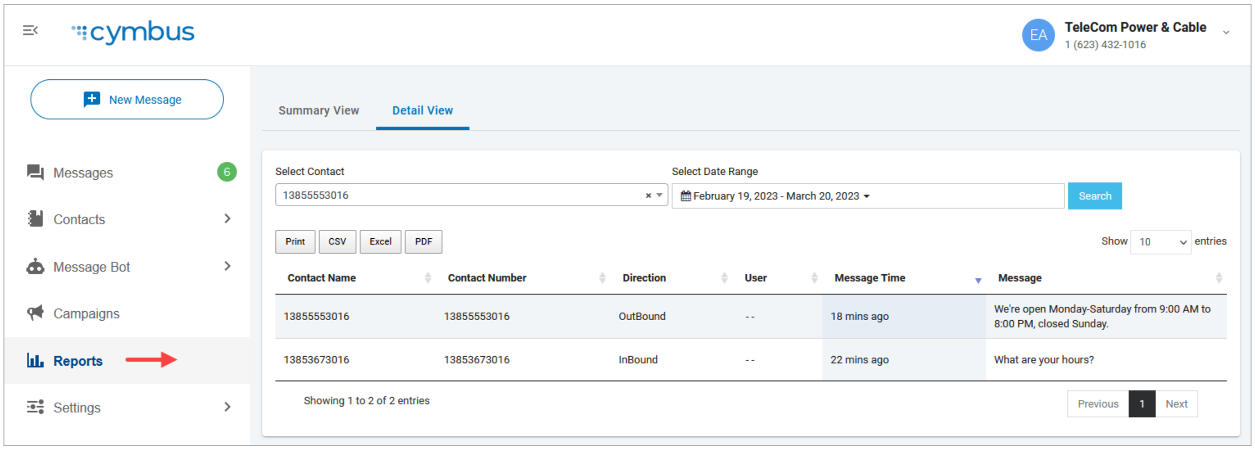


- **Select Contact.** View all contacts or select a contact from the list.
- **Select Date Range.** Click to change the range: Today, Yesterday, Last 7 Days, Last 30 Days, This Month, Last Month, Last 12 Months, or Custom Range.
- **Search.** Search for the contact (or all contacts) and the date range specified on the left. The results will be displayed below.
- **Download.** A table of entries can be printed or downloaded as a CSV, Excel file, or PDF. It's an easy way to view your reports offline.
- **Show Entries.** Choose how many entries to show per page: 10, 25, 50, 100.
- **Sort.** Click on the table headings to sort the table: Contact Name, Contact Number, Inbound SMS Count, Outbound SMS Count, Inbound MMS Count, Outbound MMS Count, and Last Message Date.

Detail View

In the **Detail View** tab, you can narrow your report by a specific contact and date range to see their complete message history.

Using the drop-down menus at the top of the tab, select a contact and choose a date range, then press **[Search]**. The results are displayed below.



- **Contact Name.** The contact's name or phone number (if they aren't in your Contact Lists yet).
- **Contact Number.** The contact's phone number.
- **Direction.** Whether the message was Inbound (from the contact to you) or Outbound (from you to the contact).
- **User.** Who or what (Auto Response, Campaign, etc.) sent the message. It is blank (--) for inbound messages.
- **Message Time.** The date and time it was sent or received.
- **Message.** A transcript of the message.

BEST PRACTICES

Text messaging is one of the best ways to reach your customers and spread the word. No one likes getting spam, whether it be unwanted phone calls, emails, or text messages. So, before you get started, it is essential that you know how to comply with the various laws and regulations surrounding text message marketing, including:

- the Telephone Consumer Protection Act (TCPA),
- the Telemarketing Sales Rule (TSR), and
- the Do Not Call Implementation Act (DNCIA).

These laws are complicated, so we've broken it down into the important bits. There are three general best practices:

1. OBTAIN WRITTEN CONSENT

Only add someone as a contact if they voluntarily opt-in to receive text messages.

Express, written consent is required by the consumer to send them promotional text messages. You might have a sign-up sheet at the front desk, include an opt-in paragraph as part of your intake forms, or post a form on your website or in the customer portal.

- Let customers know how often they'll receive messages, what those messages will contain, and how they will be sent (automatic or manual).
- Customers should be added only to the contact list(s) they have expressly agreed to. For example, if someone agreed to receive messages about their appointments, they may not have agreed to receive messages with marketing content.
- Do not use rented or shared consumer opt-in lists. Any contact you are messaging should opt-in directly with your company.
- Do not send message content that is unlawful, deceptive or misleading, fraudulent, unwanted, or illicit.

2. ENSURE THAT CONSENT IS INFORMED

Message senders should display clear and conspicuous disclosures about the type and purpose of the messaging the consumer will receive.

Appropriate disclosures, known as a "call-to-action," should include:

- the program or product description,
- the specific identity of the organization or individual being represented, and
- clear and conspicuous language about scope of opt-in and mechanisms for opt-out.

With each message, include a signature that clearly identifies your business and a link to opt out. The signature can be anywhere in the text but posting it at the beginning makes it easy for customers to identify your message when scrolling through their message history or when it pops up in their notifications.

Here are a few examples:

- Jiffy Tires: You're signed up for recurring automatic marketing messages. (Reply OPT-OUT to unsubscribe, HELP for help)
- Maisel has an appointment at the Animal Hospital on July 3. Reply "C" to confirm or call 555-123-1234 to reschedule.
- Your order has shipped! Track it here: link.link — Woodsy Things (Text STOP to opt-out)

3. FACILITATE AND HONOR OPT-OUT REQUESTS

Ensure that consumers are able to opt-out of receiving messages at any time.

Maintain and update recipient lists by processing deactivation/opt-out requests daily. Failure to process opt-outs can lead to serious financial risk from TCPA violations.

Learn how to Manage Opt-Outs in the Business Text Messaging portal.

When a customer does ask to opt out, you can send them one final text message to confirm that they will no longer receive these messages, but it's often best to not respond and simply remove their number from your contact lists. If you want to keep their number in your system for other reasons (for example, they may still opt-in to appointment reminders but out of marketing messages), you could add them to a *do not contact* list, like "Marketing Opt Out."

CTIA GUIDANCE

For more detailed information, refer to CTIA Messaging Principles and Best Practices.
For guidance on political messages, refer to CTIA Political Campaign Messaging Explainer.

NOT HIPAA COMPLIANT

Cymbus Business Text Messaging is *not* HIPAA compliant. Do not send any protected health information through this application.

Have any questions about Cymbus Business Text Messaging?
Visit the Cymbus Help Center at http://help.cymbus.com.

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