

Messenger Guide



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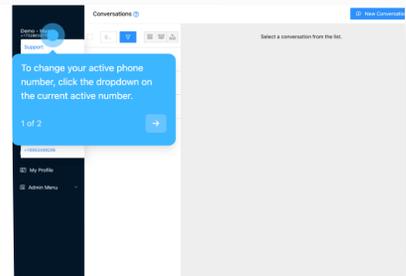
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Number Switcher

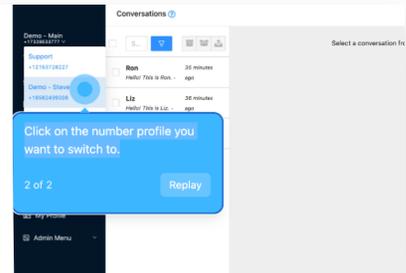
1

To change your active phone number, **click the dropdown** on the current active number.



2

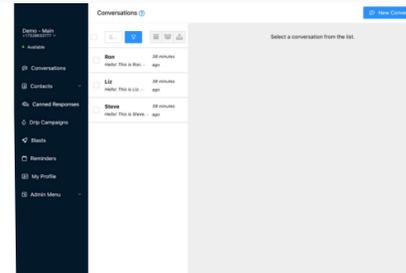
Click on the number profile you want to switch to.



Away Message

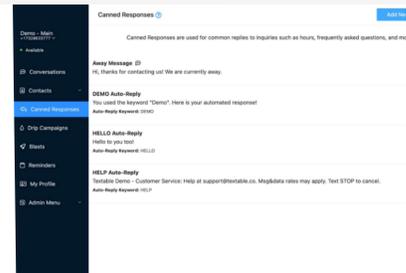
1

To enable an away message, start by clicking into the **"Canned Responses"** section.



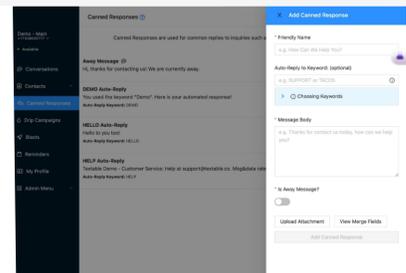
2

Click on either **"Add New Responses"** or click on an existing response.



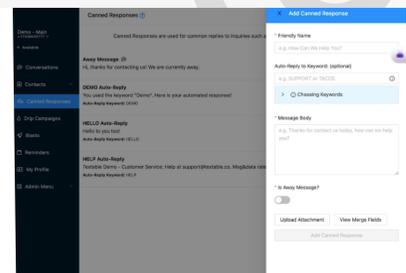
3

Enter the details of the canned response (**away message**).



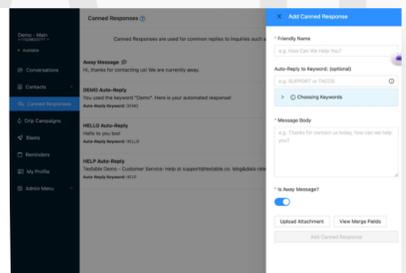
4

Toggle the slider to enable this canned response as an available away message.



5

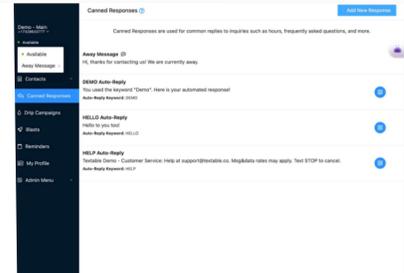
Click on **"Edit Canned Response"** or **"Add Canned Response"** to save your away message.



Away Message

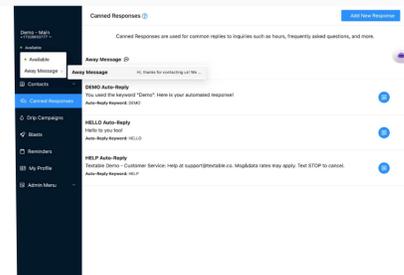
6

Click on your current **"Available"** messaging status.



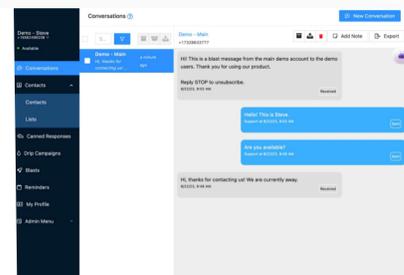
7

Hover over **"Away message"**, then choose your away message auto-response.



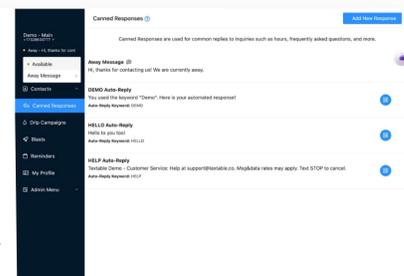
8

Here you can see that when someone sends a new message, **they automatically receive the auto-reply that you set.**



9

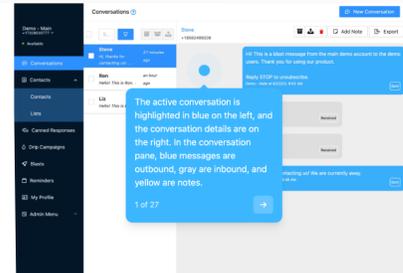
To change your status back from "Away" so new messages do not receive an auto reply, click on or hover your "Away" status. Then, click on "Available" to update your status and no longer send away messages.



Conversions

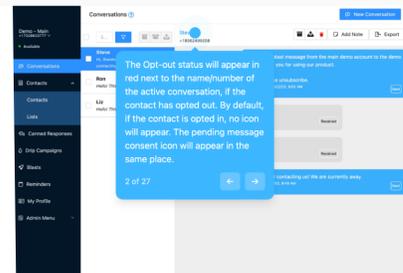
1

The active conversation is highlighted in blue on the left, and the conversation details are on the right. In the conversation pane, blue messages are outbound, gray are inbound, and yellow are notes.



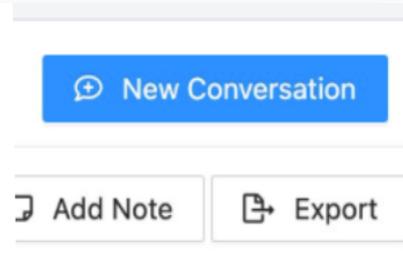
2

The Opt-out status will appear in red next to the name/number of the active conversation, if the contact has opted out. By default, if the contact is opted in, no icon will appear. The pending message consent icon will appear in the same place.



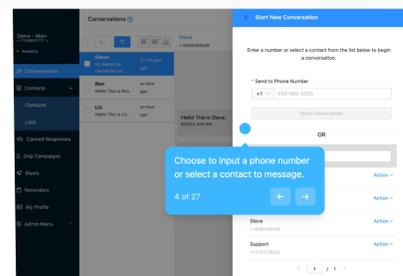
3

To start a new conversation, click the "New Conversation" button in the top right.



4

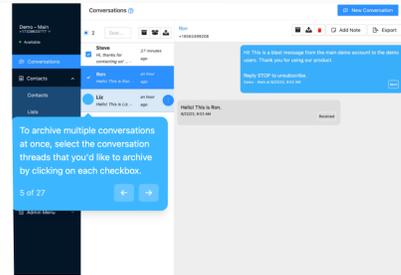
Choose to input a phone number or select a contact to message.



Conversions

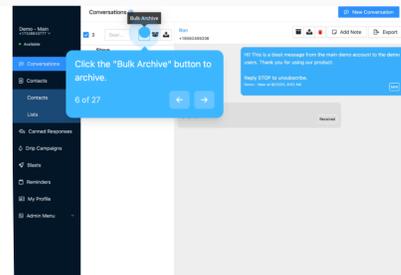
5

To archive multiple conversations at once, select the conversation threads that you'd like to archive by clicking on each checkbox. To start a new conversation, click the "New" button.



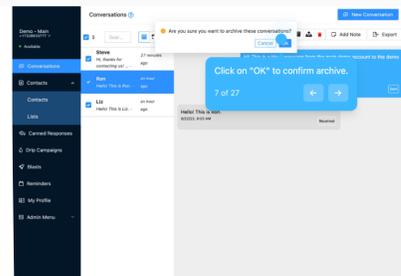
6

Click the "Bulk Archive" button to archive.



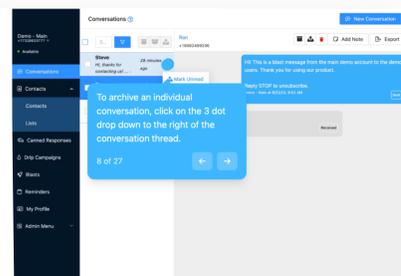
7

Click on "OK" to confirm archive.



8

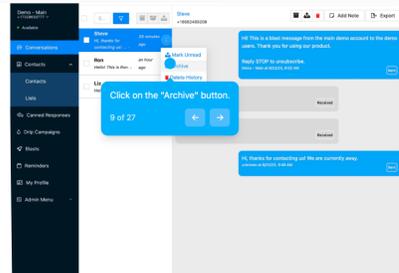
To archive an individual conversation, click on the 3 dot drop down to the right of the conversation thread.



Conversions

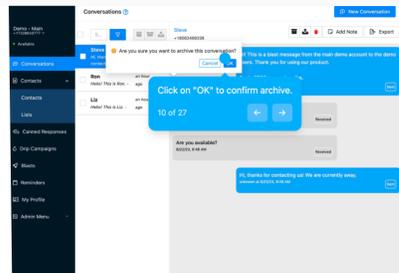
9

Click on the "Archive" button.



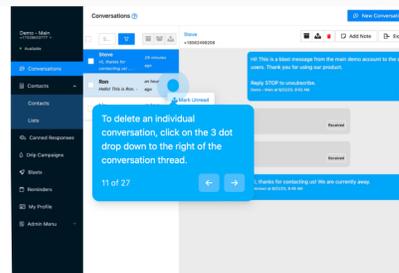
10

Click on "OK" to confirm archive.



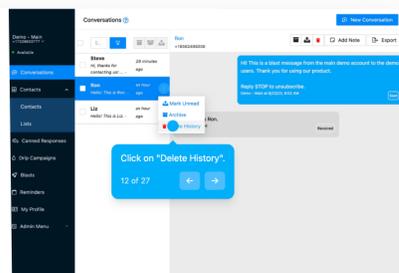
11

To delete an individual conversation, click on the 3 dot drop down to the right of the conversation thread.



12

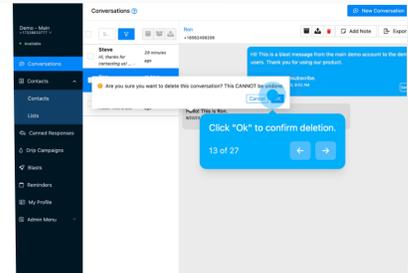
Click on "Delete History".



Conversions

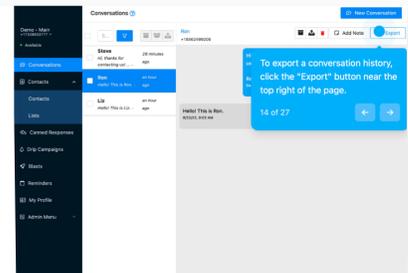
13

Click "Ok" to confirm deletion.



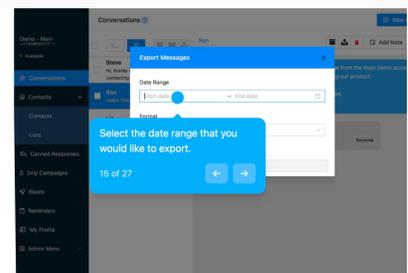
14

To export a conversation history, click the "Export" button near the top right of the page.



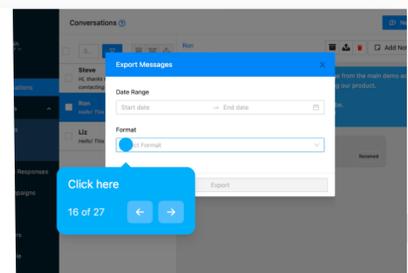
15

Select the date range that you would like to export.



16

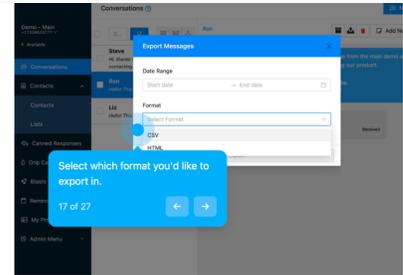
Click here



Conversions

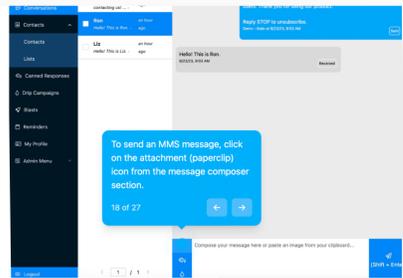
17

Select which format you'd like to export in



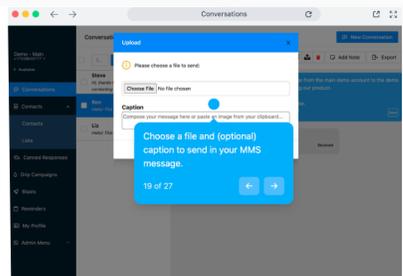
18

To send an MMS message, click on the attachment (paperclip) icon from the message composer section



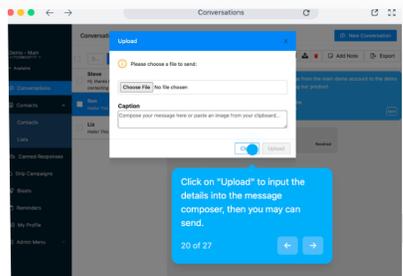
19

Choose a file and (optional) caption to send in your MMS message.



20

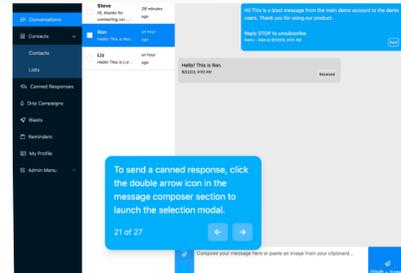
Click on "Upload" to input the details into the message composer, then you may can send.



Conversions

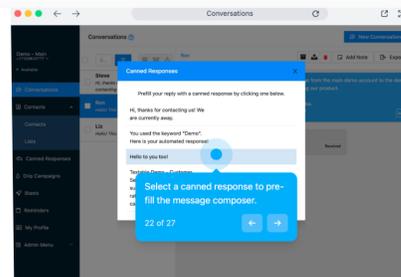
21

To send a canned response, click the double arrow icon in the message composer section to launch the selection modal.



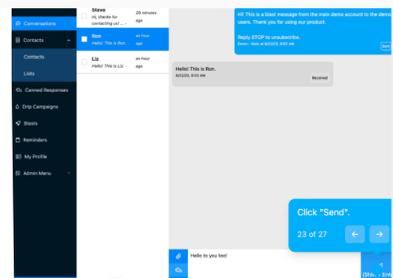
22

Select a canned response to pre-fill the message composer.



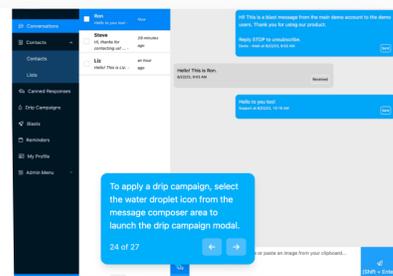
23

Click "Send".



24

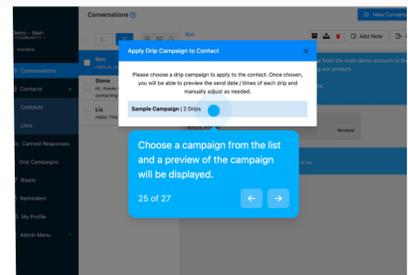
To apply a drip campaign, select the water droplet icon from the message composer area to launch the drip campaign modal.



Conversions

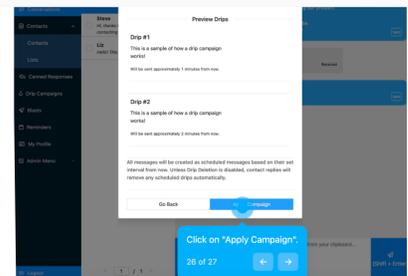
25

Choose a campaign from the list and a preview of the campaign will be displayed.



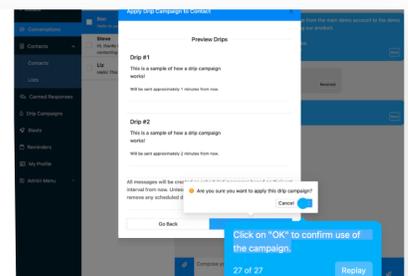
26

Click on "Apply Campaign".



27

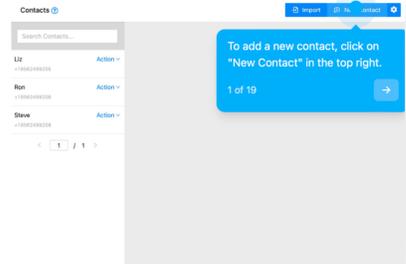
Click on "OK" to confirm use of the campaign.



Contacts

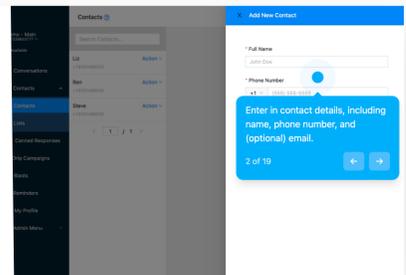
1

To add a new contact, click on "New Contact" in the top right.



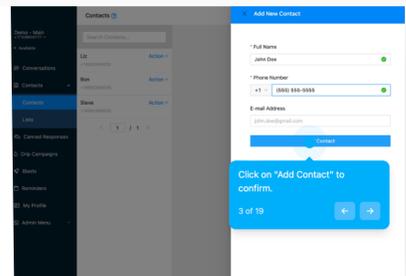
2

Enter in contact details, including name, phone number, and (optional) email.



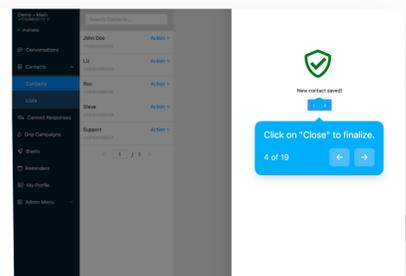
3

Click on "Add Contact" to confirm.



4

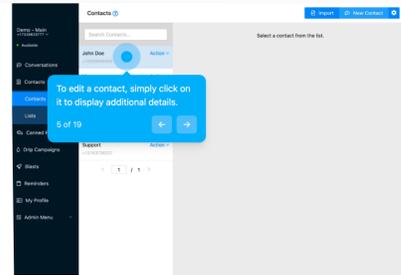
Click on "Close" to finalize.



Contacts

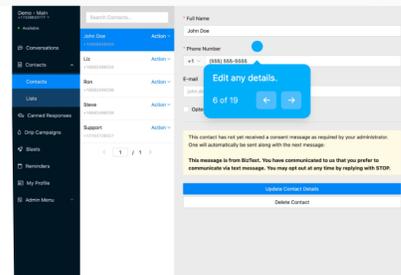
5

To edit a contact, simply click on it to display additional details.



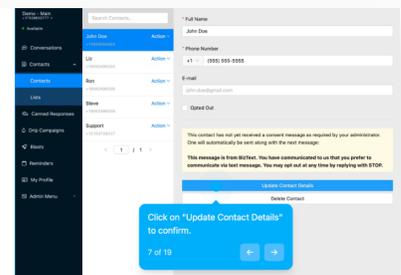
6

Edit any details.



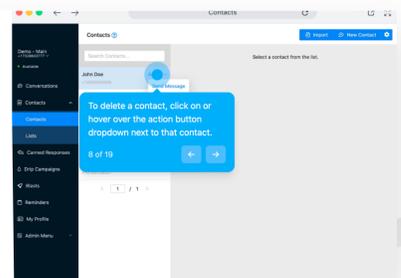
7

Click on "Update Contact Details" to confirm.



8

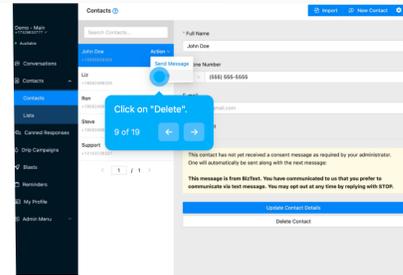
To delete a contact, click on or hover over the action button dropdown next to that contact.



Contacts

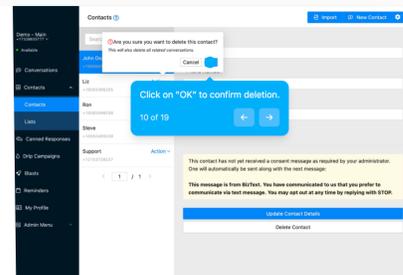
9

Click on "Delete".



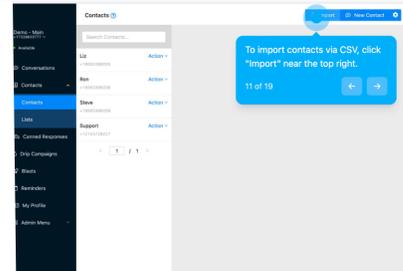
10

Click on "OK" to confirm deletion.



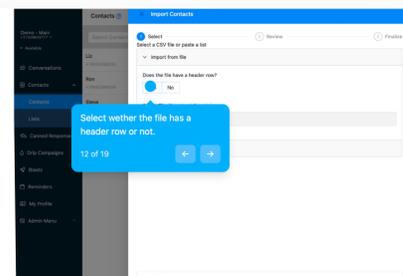
11

To import contacts via CSV, click "Import" near the top right.



12

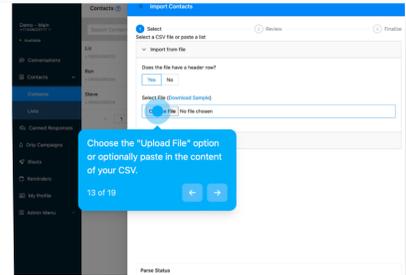
Select whether the file has a header row or not.



Contacts

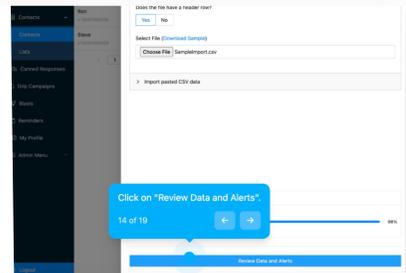
13

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



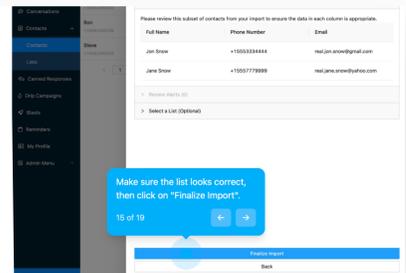
14

Click on "Review Data and Alerts".



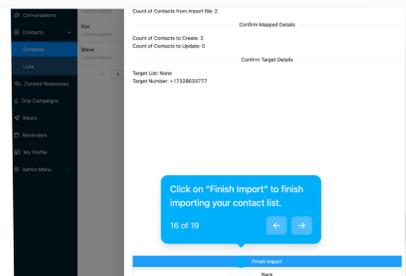
15

Make sure the list looks correct, then click on "Finalize Import".



16

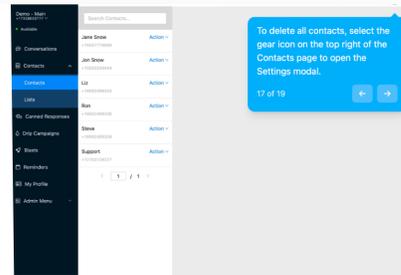
Click on "Finish Import" to finish importing your contact list.



Contacts

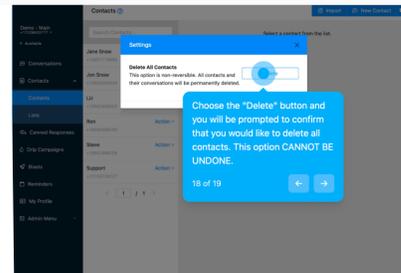
17

To delete all contacts, select the gear icon on the top right of the Contacts page to open the Settings modal.



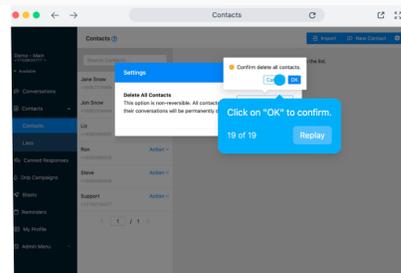
18

Choose the "Delete" button and you will be prompted to confirm that you would like to delete all contacts. This option CANNOT BE UNDONE.



19

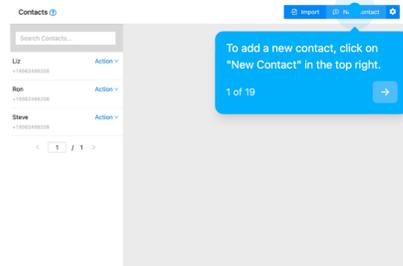
Click on "OK" to confirm.



Contacts - List

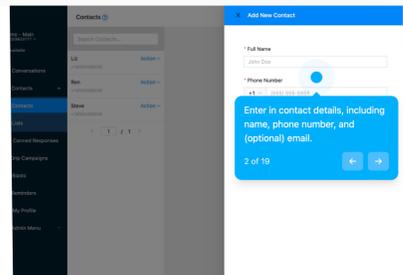
1

To add a new contact, click on "New Contact" in the top right.



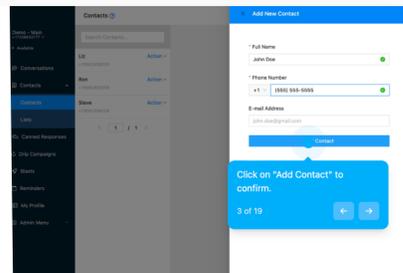
2

Enter in contact details, including name, phone number, and (optional) email.



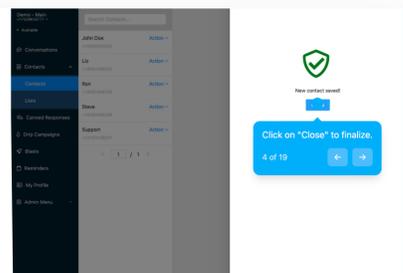
3

Click on "Add Contact" to confirm.



4

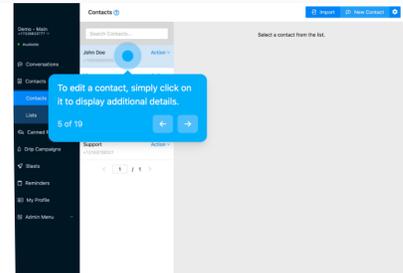
Click on "Close" to finalize.



Contacts - List

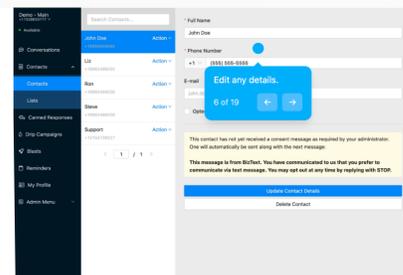
5

To edit a contact, simply click on it to display additional details.



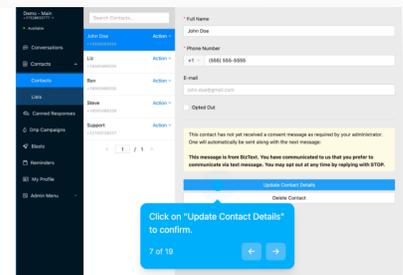
6

Edit any details.



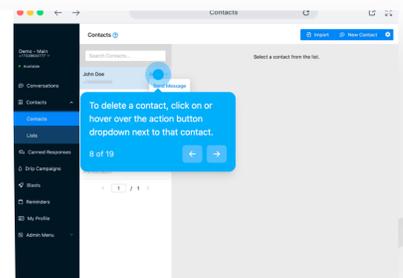
7

Click on "Update Contact Details" to confirm.



8

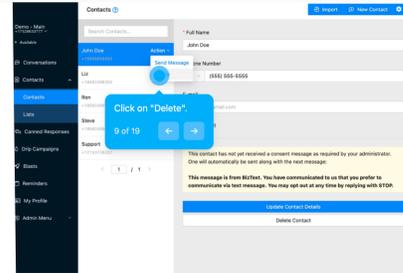
To delete a contact, click on or hover over the action button dropdown next to that contact.



Contacts - List

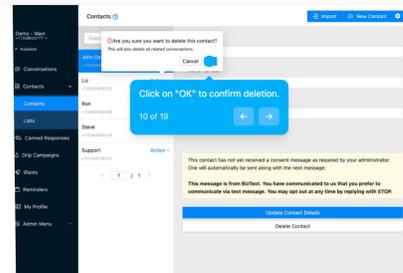
9

Click on "Delete".



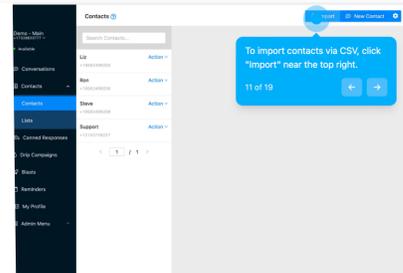
10

Click on "OK" to confirm deletion.



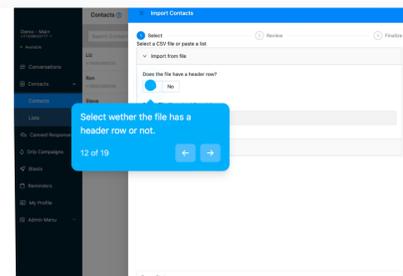
11

To import contacts via CSV, click "Import" near the top right.



12

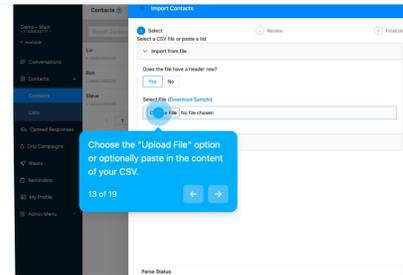
Select whether the file has a header row or not.



Contacts - List

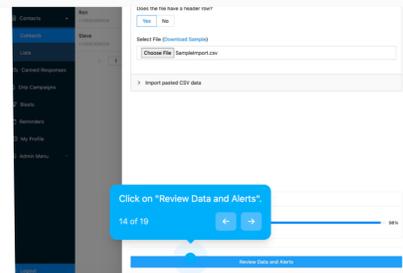
13

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



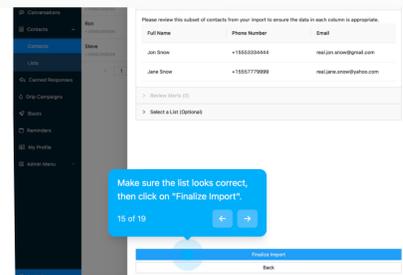
14

Click on "Review Data and Alerts".



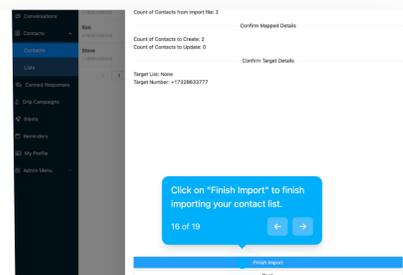
15

Make sure the list looks correct, then click on "Finalize Import".



16

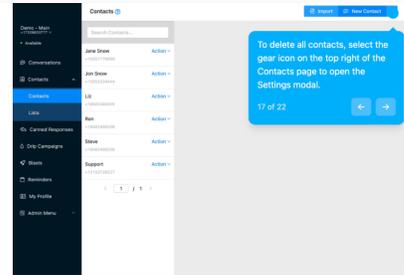
Click on "Finish Import" to finish importing your contact list.



Contacts - List

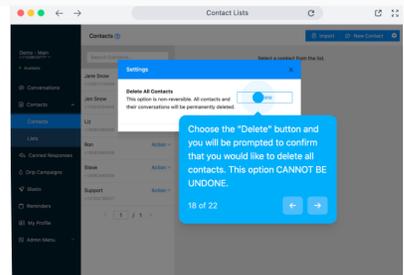
17

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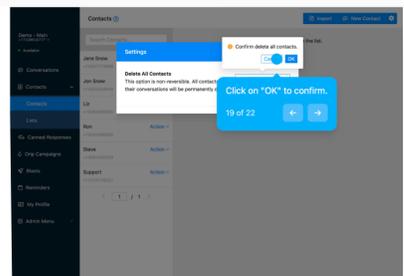
18

Choose the "Delete" button and you will be prompted to confirm that you would like to delete all contacts. This option CANNOT BE UNDONE.



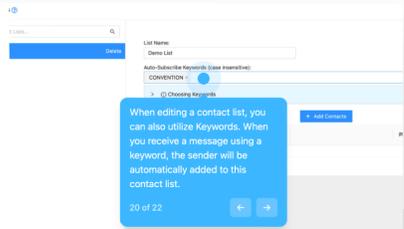
19

Click on "OK" to confirm.



20

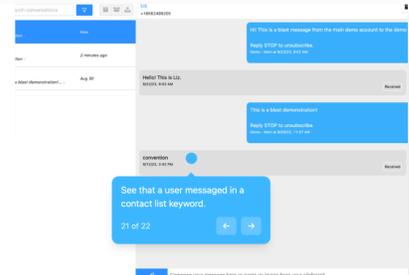
When editing a contact list, you can also utilize Keywords. When you receive a message using a keyword, the sender will be automatically added to this contact list.



Contacts - List

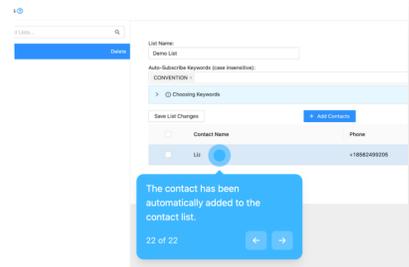
21

See that a user messaged in a contact list keyword.



22

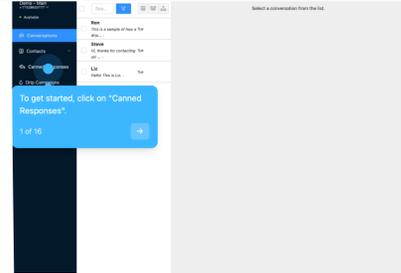
The contact has been automatically added to the contact list.



Canned Response

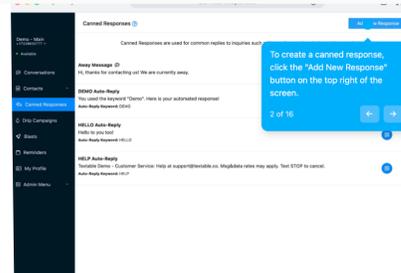
1

To get started, click on "Canned Responses".



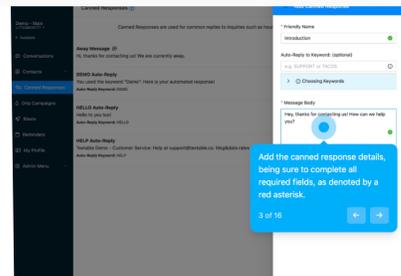
2

To create a canned response, click the "Add New Response" button on the top right of the screen.



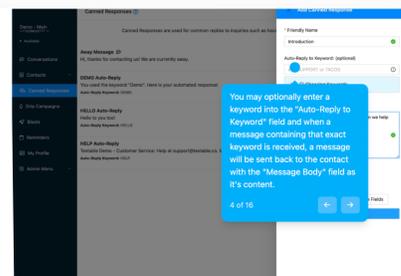
3

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



4

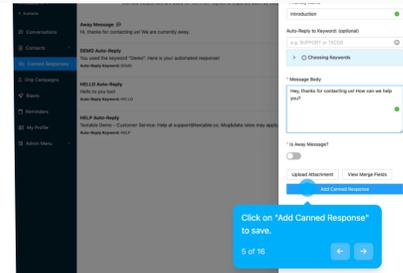
You may optionally enter a keyword into the "Auto-Reply to Keyword" field and when a message containing that exact keyword is received, a message will be sent back to the contact with the "Message Body" field as its content.



Canned Response

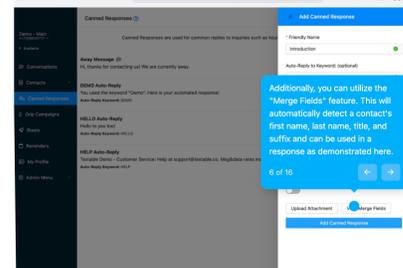
5

Click on "Add Canned Response" to save.



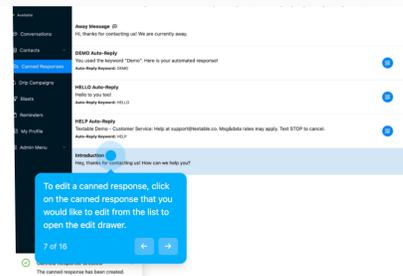
6

Additionally, you can utilize the "Merge Fields" feature. This will automatically detect a contact's first name, last name, title, and suffix and can be used in a response as demonstrated here.



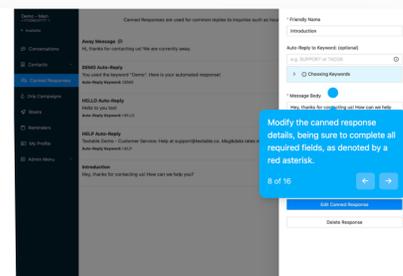
7

To edit a canned response, click on the canned response that you would like to edit from the list to open the edit drawer.



8

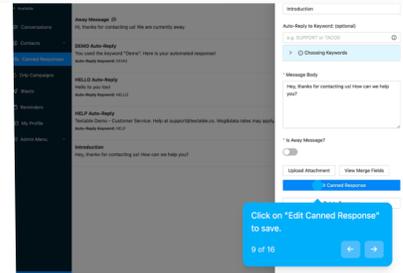
Modify the canned response details, being sure to complete all required fields, as denoted by a red asterisk.



Canned Response

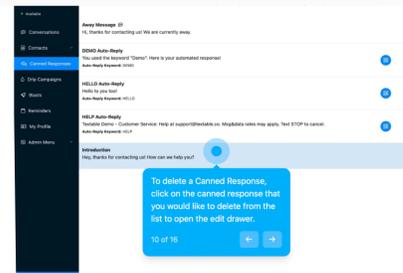
9

Click on "Edit Canned Response" to save.



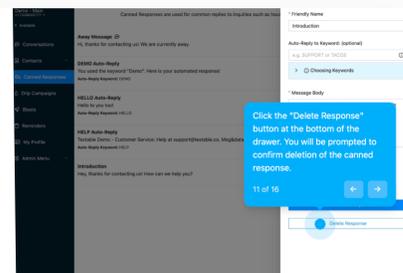
10

To delete a Canned Response, click on the canned response that you would like to delete from the list to open the edit drawer.



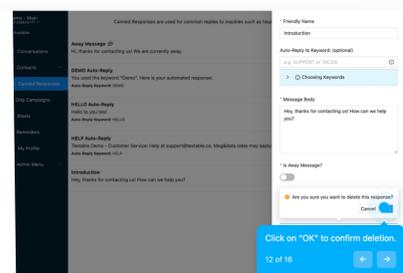
11

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



12

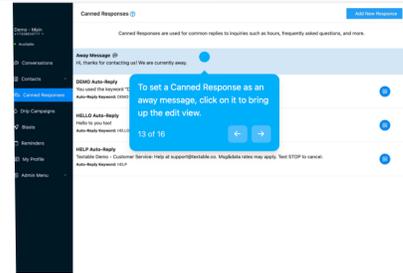
Click on "OK" to confirm deletion.



Canned Response

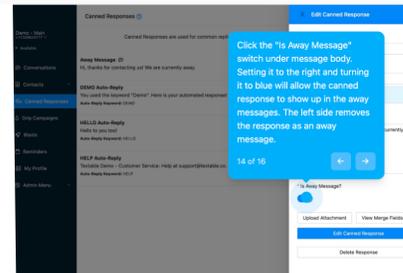
13

To set a Canned Response as an away message, click on it to bring up the edit view.



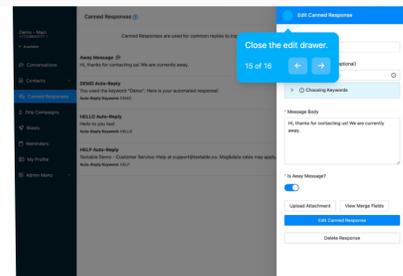
14

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



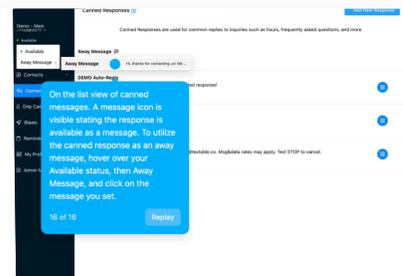
15

Close the edit drawer.



16

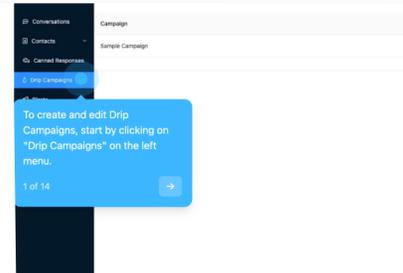
On the list view of canned messages, a message icon is visible stating the response is available as a message. To utilize the canned response as an away message, hover over your Available status, then Away Message, and click on the message you set.



Drip Campaign

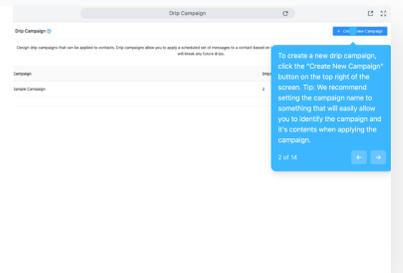
1

To create and edit Drip Campaigns, start by clicking on "Drip Campaigns" on the left menu.



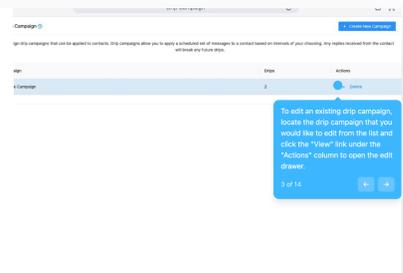
2

To create a new drip campaign, click the "Create New Campaign" button on the top right of the screen. Tip: We recommend setting the campaign name to something that will easily allow you to identify the campaign and it's contents when applying the campaign.



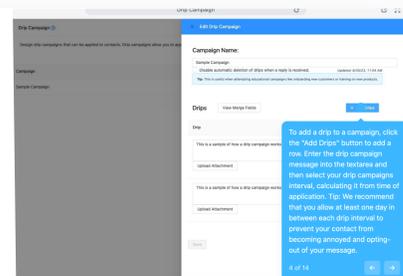
3

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



4

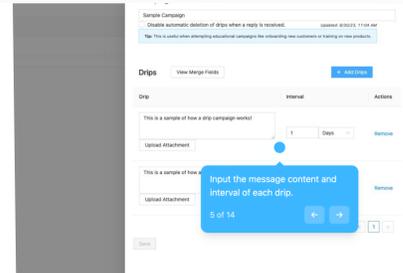
To add a drip to a campaign, click the "Add Drips" button to add a row. Enter the drip campaign message into the textarea and then select your drip campaigns interval, calculating it from time of application. Tip: We recommend that you allow at least one day in between each drip interval to prevent your contact from becoming annoyed and opting-out of your message.



Drip Campaign

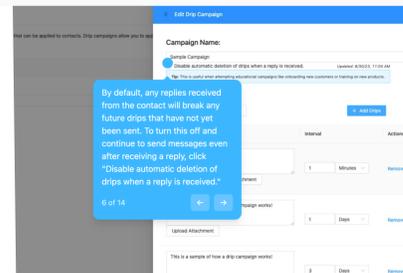
5

Input the message content and interval of each drip.



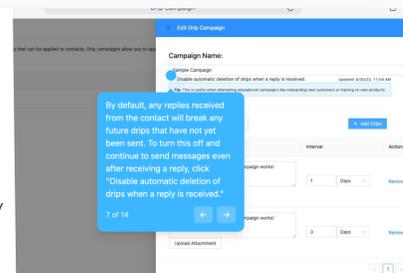
6

By default, any replies received from the contact will break any future drips that have not yet been sent. To turn this off and continue to send messages even after receiving a reply, click "Disable automatic deletion of drips when a reply is received."



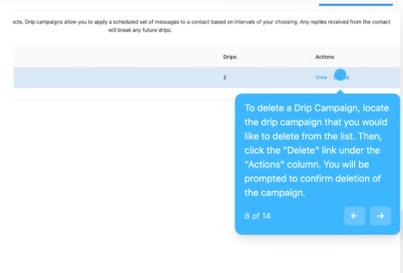
7

By default, any replies received from the contact will break any future drips that have not yet been sent. To turn this off and continue to send messages even after receiving a reply, click "Disable automatic deletion of drips when a reply is received."



8

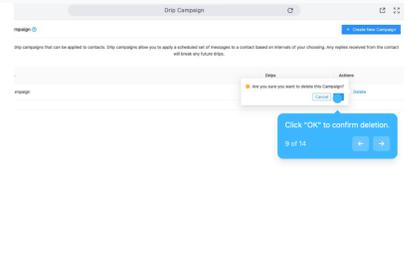
To delete a Drip Campaign, locate the drip campaign that you would like to delete from the list. Then, click the "Delete" link under the "Actions" column. You will be prompted to confirm deletion of the campaign.



Drip Campaign

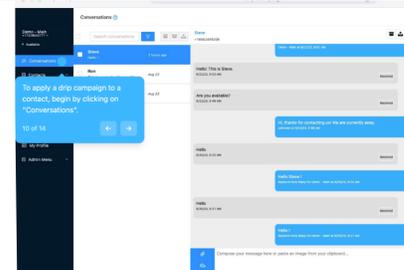
9

Click "OK" to confirm deletion.



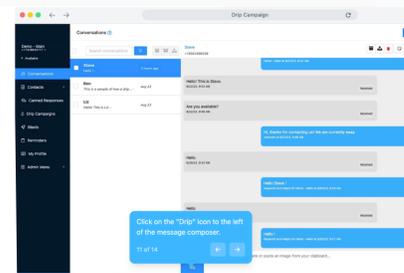
10

To apply a drip campaign to a contact, begin by clicking on "Conversations".



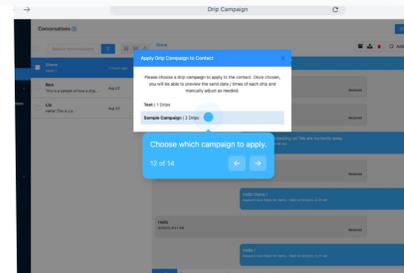
11

Click on the "Drip" icon to the left of the message composer.



12

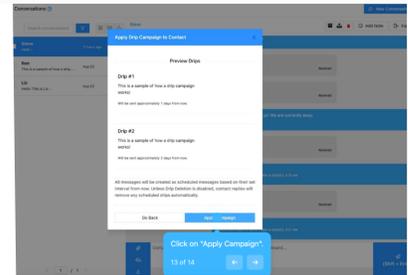
Choose which campaign to apply.



Drip Campaign

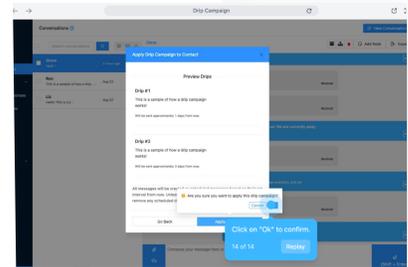
13

Click on "Apply Campaign".



14

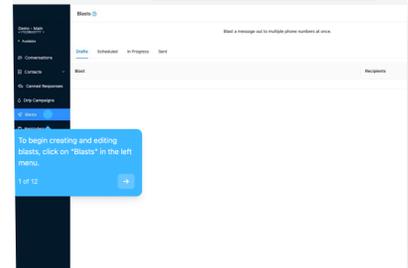
Click on "Ok" to confirm.



Blasts

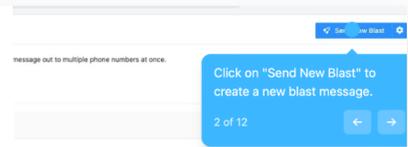
1

To begin creating and editing blasts, click on "Blasts" in the left menu.



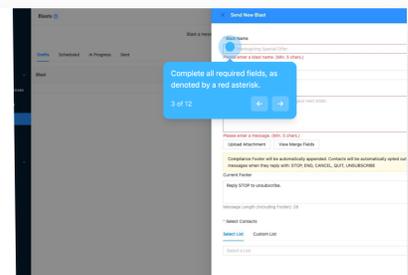
2

Click on "Send New Blast" to create a new blast message.



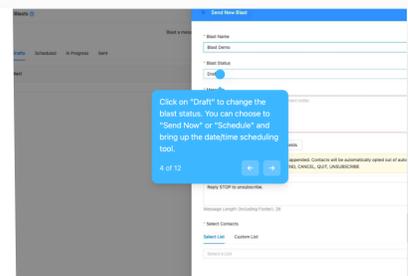
3

Complete all required fields, as denoted by a red asterisk.



4

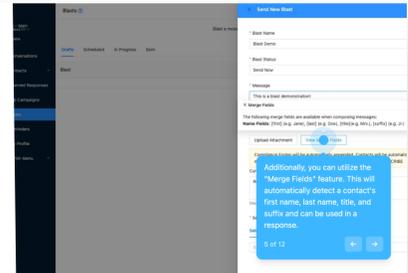
Click on "Draft" to change the blast status. You can choose to "Send Now" or "Schedule" and bring up the date/time scheduling tool.



Blasts

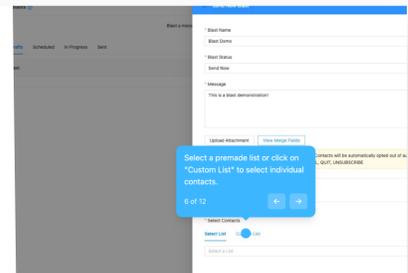
5

Additionally, you can utilize the "Merge Fields" feature. This will automatically detect a contact's first name, last name, title, and suffix and can be used in a response.



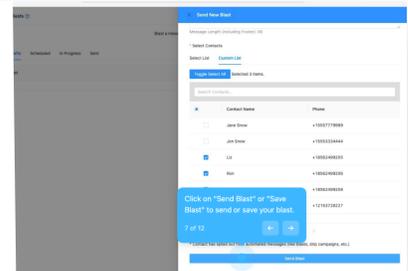
6

Select a premade list or click on "Custom List" to select individual contacts.



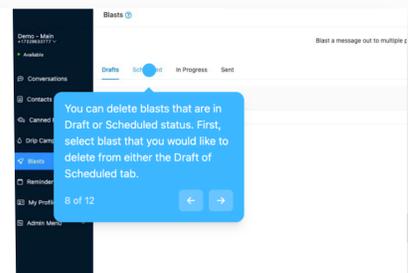
7

Click on "Send Blast" or "Save Blast" to send or save your blast.



8

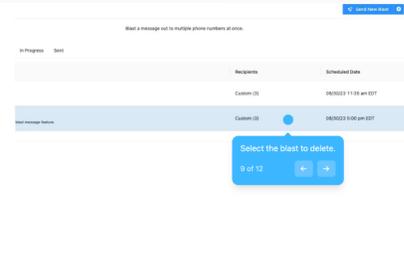
You can delete blasts that are in Draft or Scheduled status. First, select blast that you would like to delete from either the Draft or Scheduled tab.



Blasts

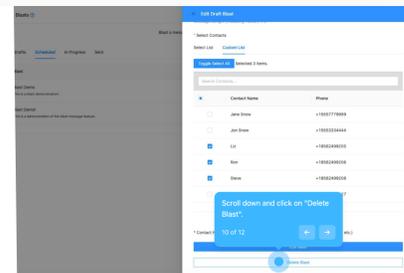
9

Select the blast to delete.



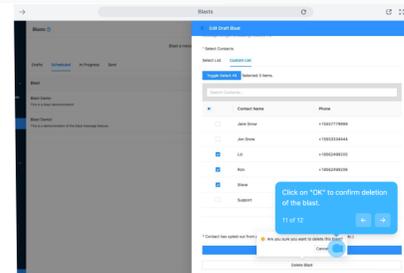
10

Scroll down and click on "Delete Blast".



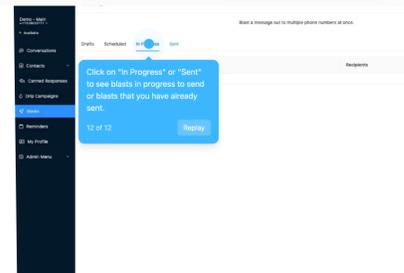
11

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



12

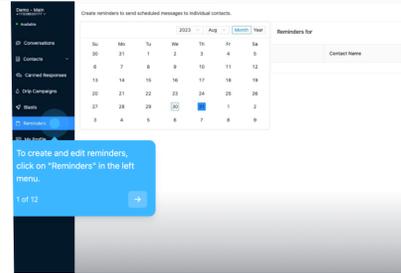
Click on "In Progress" or "Sent" to see blasts in progress to send or blasts that you have already sent.



Reminders

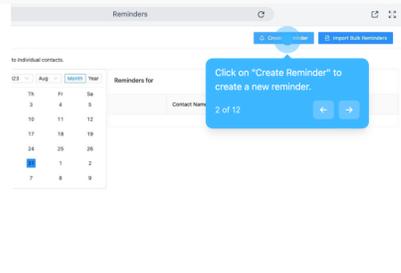
1

To create and edit reminders, click on "Reminders" in the left menu.



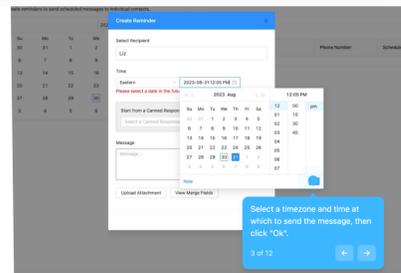
2

Click on "Create Reminder" to create a new reminder.



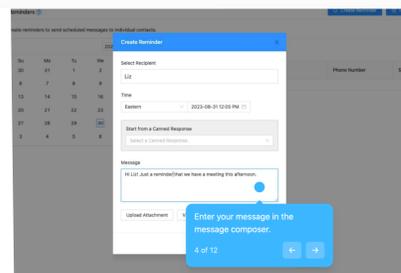
3

Select a timezone and time at which to send the message, then click "Ok".



4

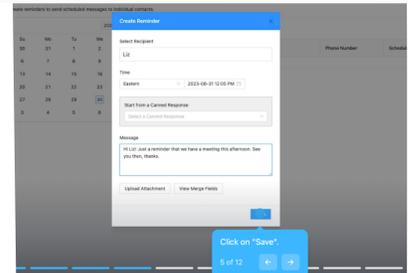
Enter your message in the message composer.



Reminders

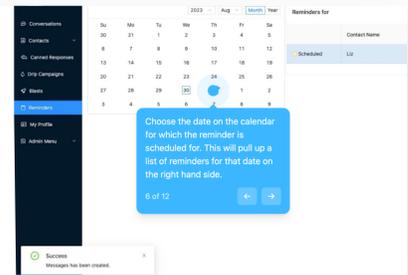
5

Click on "Save".



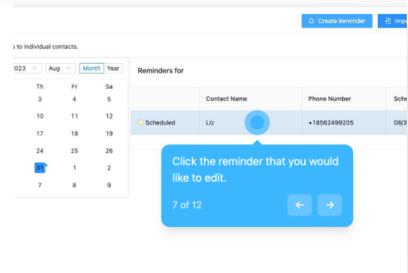
6

Choose the date on the calendar for which the reminder is scheduled for. This will pull up a list of reminders for that date on the right hand side.



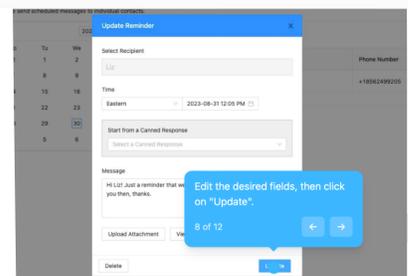
7

Click the reminder that you would like to edit.



8

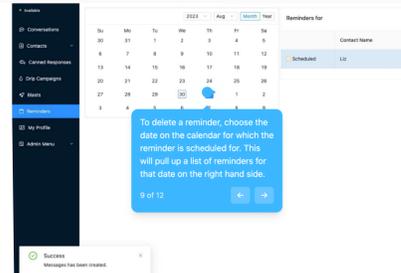
Edit the desired fields, then click on "Update".



Reminders

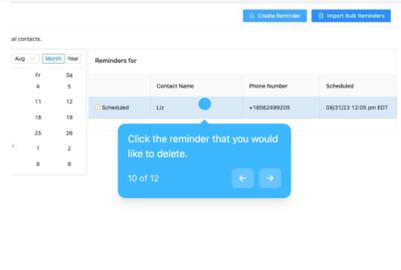
9

To delete a reminder, choose the date on the calendar for which the reminder is scheduled for. This will pull up a list of reminders for that date on the right hand side.



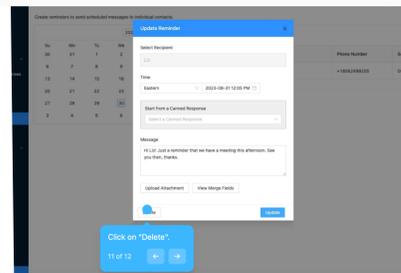
10

Click the reminder that you would like to delete.



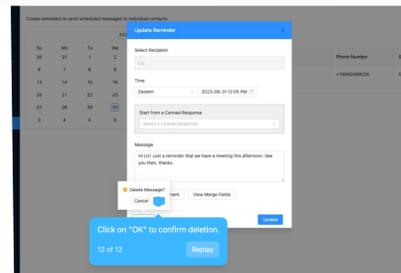
11

Click on "Delete".



12

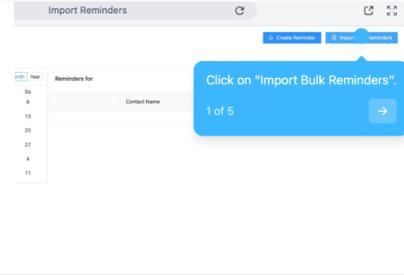
Click on "OK" to confirm deletion.



Important Reminders

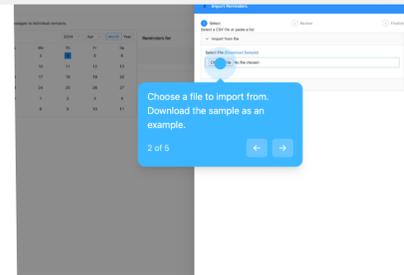
1

Click on "Import Bulk Reminders".



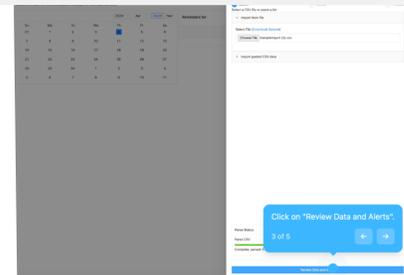
2

Choose a file to import from. Download the sample as an example.



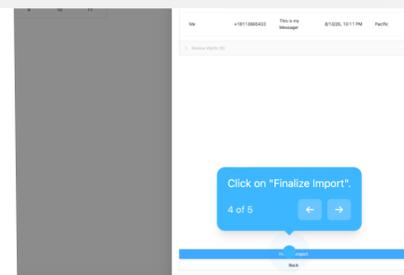
3

Click on "Review Data and Alerts".



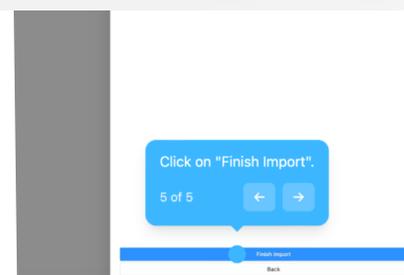
4

Click on "Finalize Import".



5

Click on "Finish Import".



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 201-801-1100

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