

Ready to get started?

You've opened your account, uploaded your data and you're ready to go. What next?

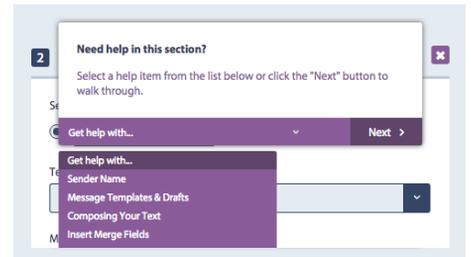
Sending any kind of communication to customers can be daunting, especially if you're sending large volumes. This guide covers everything you need to know about sending SMS with Messenger.

Sending SMS

Login to Messenger and click **'Send Text Message'** at the top left of the main navigation bar. This brings up the screen where you can plan and create your messages.



Click over this icon on every screen to navigate around the page for a step-by-step guide on how to use your Messenger account.



The screenshot shows the Textlocal Messenger 3.0 interface. At the top, there's a header with the Textlocal logo and "Messenger 3.0". On the right, it shows "101 Text Credits" and "1 MMS Credits" with "Buy" and "Support" buttons. Below the header is a navigation bar with tabs: Dashboard, Send, Receive, Contacts, Mobile Pages, Ticketing, Surveys, Reports, Settings, Help, and Wizard. A sub-navigation bar says "Send a text message".

The main content area is divided into two sections:

- 1 Send Message To:** This section has tabs for "Groups", "Inboxes", "Contacts", "Search", and "Single". Under "Groups", there's a list item "Friday Night" with a "1" icon, "Edit", and "Expand" options. A "Manage Groups" button is at the bottom.
- 2 Message Details:** This section contains fields for "Sender Name" (with a dropdown and "Simple Reply Service" option), "Templates & History" (with a "Click to select..." dropdown), a "Message" text area with an "Insert Merge Fields" button, a character count "You have used 0 characters.", a "Schedule" section with a date and time picker, and an "Include opt-out message" section with a dropdown menu showing "Optout: Text HYNG6STOP to 60777 (GB only)".

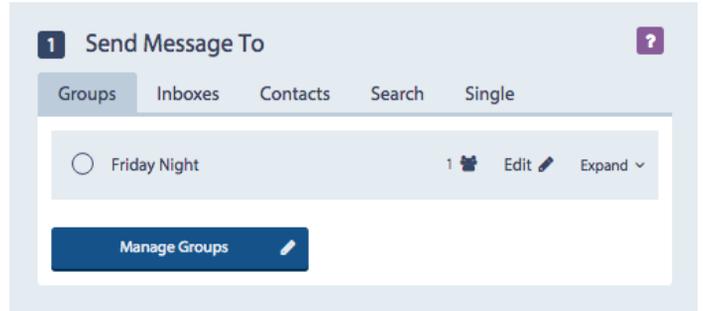
At the bottom right, there are two buttons: "Save Message in Drafts" and "Send Message". A magnifying glass icon is overlaid on the "Message Details" section, highlighting a question mark icon.

5 easy steps to creating your text message

Step 1 – Who are you sending your messages to?

Starting on the left hand side of the screen, select the group or individual contacts that you want to receive your message. You can either choose a group, inbox contacts (people who have replied to one of your inbound numbers), individual contact numbers or enter new numbers one at a time.

If you haven't uploaded any contacts, please refer to our '[How to Create a Database](#)' guide which explains how to do this.



Textlocal Tip

Create a test group of colleagues to send trial messages to.

Step 2 – Creating a sender name

Your sender name is the name that your message appears from on the recipient's phone. This can be anything up to 11 characters, but remember this important rule:

If you are using a sender name which isn't a phone number (i.e. your company name), you won't be able to receive replies because the receiving handset doesn't have a receiving number to send the message back to.

Textlocal Tip

If your company name is longer than 11 characters, try shortening it in a way your customers will recognise.

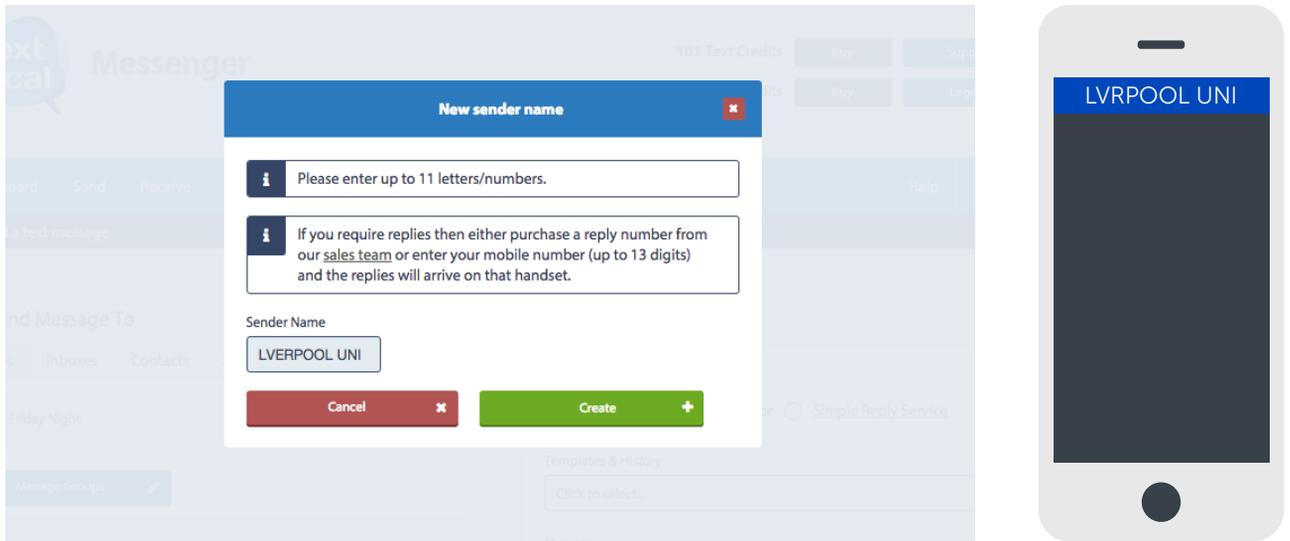
To receive replies, your sender name must be the send number. This can be either of the following:

- **A Dedicated Inbound Number (DIN) or Virtual Mobile Number.** A DIN looks like a mobile number and replies are routed directly to your inbox in Messenger, so ideal for larger volumes.
- **Simple Reply Service.** Select the Simple Reply Service as the sender name and we will allocate an available inbound number so you can receive replies. These are stored in your Simple Reply Service inbox.
- **Your own mobile number.** All replies will go straight to your handset, bypassing Messenger. This a great option if you are only expecting one or two replies.

Note: Each message you send via the Simple Reply Service will use 1.5 credits, or free with our Messenger+ package.

Having an effective sender name

The sender name will often be the first thing that your recipient sees, so it's important to get this right. An obvious choice might be to use your company name, or a shortened version of it, to fit within the 11 character limit. If your message is about a certain product or event, try using that name to generate maximum awareness.

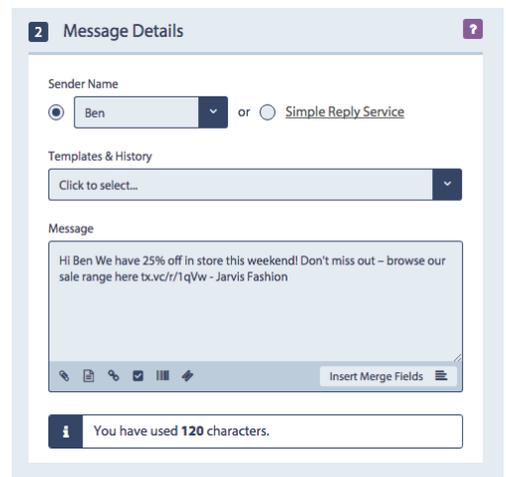


Step 3 – What to say in your message

You know your customers better than anyone, so it's likely you will have a good idea of the kinds of messages that give you the best result. We suggest you follow these simple rules:

- Make sure your message is clear, whether it's a special offer or information about an upcoming event or promotion.
- Give a clear call to action. Your message is wasted if the recipient doesn't know what to do with it. Clearly state if they need to quote a code, make a call, click a link or simply visit a store or website.
- Don't send your messages in UPPERCASE – it looks like you're shouting.

Target your message to your specific group of customers who are more likely to show interest. In our guide '[How to create a database using Messenger](#)', we recommend segmenting your customer groups based on the information you hold on them. For example, don't send the male gym members a special offer on ladies gym clothing.



Textlocal Tip

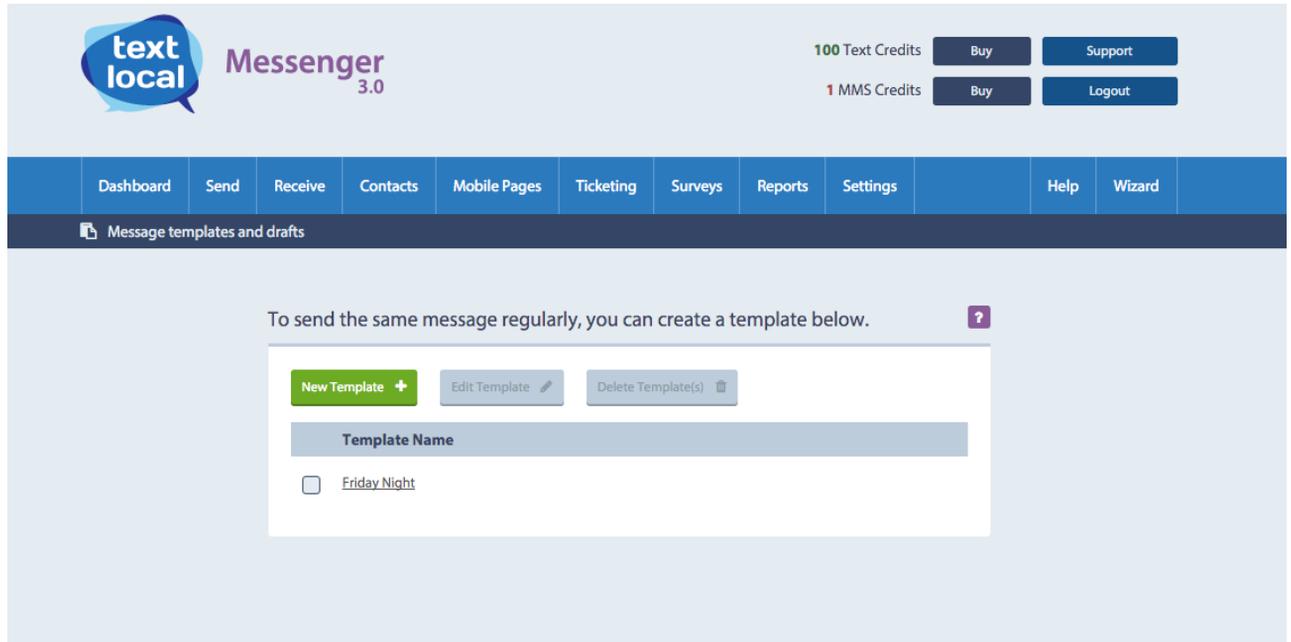
For more professional sounding messages, avoid using text speak!

Step 4 – Templates and history

If you are going to send the same message multiple times, you can store this as a template and simply select it from the drop down menu under your sender name options. You can edit these in the templates and history section, accessed from the drop down on the main navigation bar. Messenger also stores your previous messages if you need to resend them.

Textlocal Tip

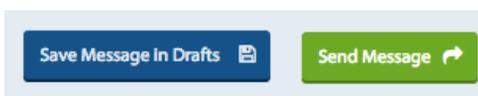
When you find a message that works particularly well, save it as a template so you remember it for next time.



The screenshot shows the Textlocal Messenger 3.0 interface. At the top left is the Textlocal logo. To its right is the text 'Messenger 3.0'. On the top right, there are two rows of buttons: '100 Text Credits' with 'Buy' and 'Support' buttons, and '1 MMS Credits' with 'Buy' and 'Logout' buttons. Below this is a navigation bar with buttons for 'Dashboard', 'Send', 'Receive', 'Contacts', 'Mobile Pages', 'Ticketing', 'Surveys', 'Reports', 'Settings', 'Help', and 'Wizard'. Below the navigation bar is a dark blue header with a folder icon and the text 'Message templates and drafts'. The main content area has a heading 'To send the same message regularly, you can create a template below.' with a help icon. Below this heading is a white box containing three buttons: 'New Template +' (green), 'Edit Template' (grey), and 'Delete Template(s)' (grey). Below these buttons is a 'Template Name' input field with a grey background. Underneath the input field is a checkbox and the text 'Friday Night'.

Step 5 – confirming and sending your message

When you are ready to send your message, click **Send Message**.



The screenshot shows two buttons side-by-side. The left button is dark blue with the text 'Save Message in Drafts' and a document icon. The right button is green with the text 'Send Message' and a right-pointing arrow icon.

Before your message is sent, you will have the opportunity to review the message content, check the recipients, preview any merged content and check the cost of the message.

£ Calculating the cost of your messages

Each time you send a message, Messenger goes through a number of steps (it's all behind the scenes, so you don't need to worry!) The platform will merge in any personalised content, calculate the number of characters in each message, remove any blocked numbers and identify any international sends.

When this process is complete, we provide you with an accurate cost for your message, which you can check before you confirm the send.

💬 SMS credits

If your account uses SMS credits, you'll see how many credits will be used along with your remaining credit balance. If you don't have sufficient credits your message will be held, unsent, while you top up your credits. Once you've added credits, you can visit the [Send Review Board](#) to confirm your message.

If you have auto-top ups on your account, your credit balance will be topped up as per your settings.

👥 Small group messages

If you are sending a small batch of messages, the cost calculation process will just take a second or two, and you'll be able to check your price and confirm your send right away. Just click the green **Send** button. Your message will then be sent immediately, or as per the scheduled time.

Are you sure you want to send this message? ✕

⚠️ You have selected a text sendname, you will *not be able to receive replies*. To find out more please [click here](#).

From GREATCO	To Suppliers (12 Contacts)
To be Sent Immediately	Cost Calculating ...

Message Preview

< Prev Next >

Cancel ✕ Send Message ➤

Are you sure you want to send this message? ✕

⚠️ You have selected a text sendname, you will *not be able to receive replies*. To find out more please [click here](#).

From GREATCO	To Suppliers (12 Contacts)
To be Sent Immediately	Cost 12 of your 97 text credits

Message Preview 1 of 10

< Prev **44770000001** Next >

We are closed on the 17th but will re-open on the 18th.

Cancel ✕ Send Message ➤



Large group messages

If you're sending to a larger group, it may take a little longer to calculate the cost before you can confirm your send. You'll see the calculating icon that shows Messenger is working on this.

In this scenario, you can choose how you want to proceed.

1. You can wait for your cost to be calculated. The green **Send** button will appear when your cost is ready.
2. If you're happy to **Send when ready**, just click this button. Your message will be sent automatically as soon as it is ready (or as per your schedule). Be aware that if you select this option you will not have the opportunity to view and confirm the final cost before it is sent.
3. Alternatively, you can select **Notify me when ready**. With this option you can leave the current page and get on with other tasks in Messenger, or you can even close Messenger completely. The calculations will continue, and we'll notify you when your cost has been calculated.



Notifications

Notifications in Messenger can help you manage your large group sends.

You will receive notifications when:

- A cost has been calculated, where you've previously selected **Notify me when ready**
- A message has been sent
- You prepared a message but do not have sufficient credits (have exceeded your send threshold/post pay limit)

Notifications appear in two places. If you are active in Messenger you will see a pop up advising you of your message statuses; you'll also see notification alerts at the top of the Messenger screen.

Notifications | Support | Logout

2,597 Text Credits Buy

10 MMS Credits Buy

Your send is ready X

Your send to **2268 numbers** in the **Customers group** has finished processing and is ready for you to review and send.

Review Send

Within these notifications you can view your message statuses and take any required actions. You can also go to the **Send Review Board** to manage all your pending messages.

Send review board

You can, at any time, check the status of your pending messages by visiting [Send > Send Review board](#)

[Notifications](#) | [Support](#) | [Logout](#)

329 Text Credits [Buy](#)
10 MMS Credits [Buy](#)

[Dashboard](#) | [Send](#) | [Receive](#) | [Contacts](#) | [Mobile Pages](#) | [Ticketing](#) | [Surveys](#) | [Reports](#) | [Settings](#) | [Wizard](#)

Send Review

<input checked="" type="checkbox"/>	Status	Sending	From	To	Recipients	Cost	
<input checked="" type="checkbox"/>	● Ready	Immediately	GREATCO	Staff	4	4 Text Credits	Review 
<input type="checkbox"/>	● Processing	Immediately	GREATCO	Customers	2,268	0 Text Credits	Review 

Summary Selected 1 send costing 4 text credits

Delete Selected Send Selected 

On this page you can review and send each message, either individually or by selecting multiple messages.

Scheduled large group sends

If you have a large group send scheduled in advance, you must confirm it before its scheduled time. We'll send you reminders to do this, but if you don't confirm your message before its scheduled time it will not be sent.

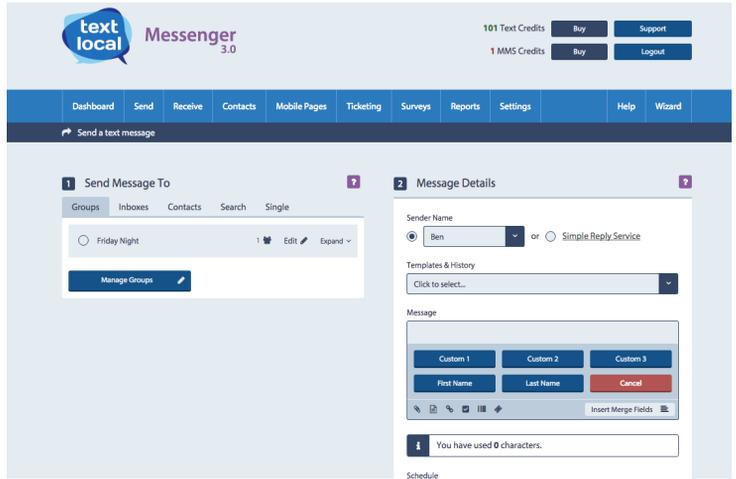
Extra tools to improve your messages

Messenger gives you the ability to personalise your messages.

Custom fields

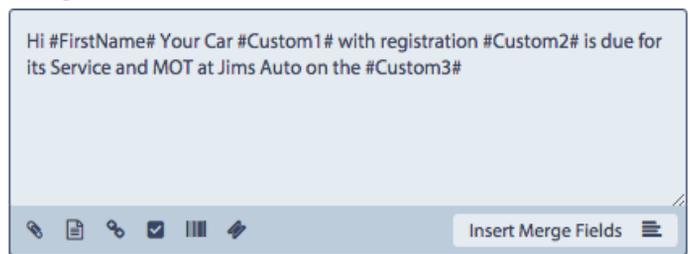
Custom fields allow you to personalise your messages, to give them more impact.

When uploading your customers' mobile numbers, you can include additional columns of information. For example, this could be an MOT reminder with specific information, so Custom 1 could be the car make and Custom 2 the MOT due date.



Uploading additional, personalised data means that you can send a message like this.

Message



Attachments

This feature allows you to insert a link to a document in your text messages. Simply click the paperclip icon, select a file up to 10MB from your computer and upload it to our secure server, and it will display as a link in your message. For more information on this feature, download our guide ["How to add short links and attachments to SMS using Messenger"](#).

Page Links

Use the **'insert page link'** tab to include a mobile web page. For more information on creating mobile web pages, please refer to our ["How to create mobile web pages using Messenger"](#) guide.

Short Links

Short links are exactly that – a shortened version of a web link. Use this tool to insert a link to any website, but with the benefit of using fewer characters from your message allowance and the ability to track who opened your link, at what time and on what device. Learn more about this feature in ["How to use short links and attachments in SMS"](#).

Survey Links

If you've used our Mobile Surveys & Forms tool to create a survey for your recipients to complete, use the survey link button to add it into your message as a link. Read our guide "[How to create mobile surveys and forms using Messenger](#)" to learn more.

Ticket Code

If you're sending out promotional offers, advertising an event or want to create a loyalty scheme, you can use our Mobile Vouchers, Tickets and Loyalty Cards tool. Any tickets you create are given a unique code for redemption.

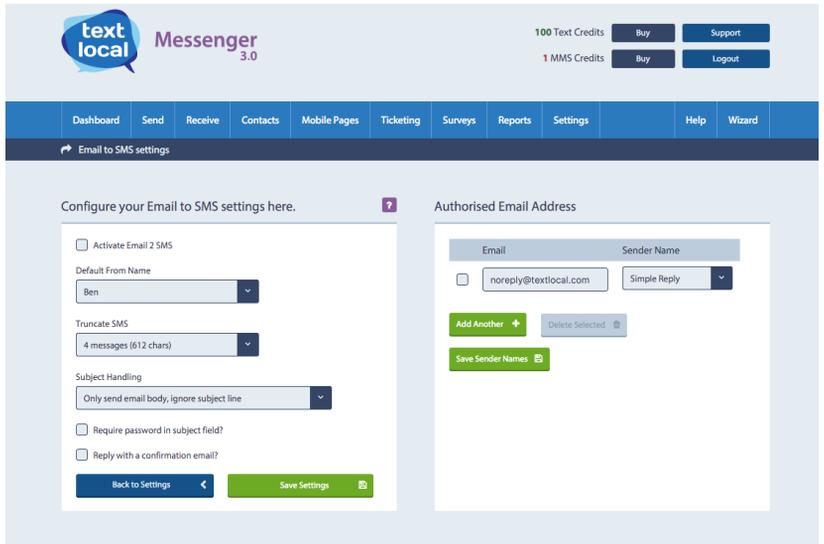
Ticket Link

Any tickets, vouchers or loyalty cards you create can be inserted as an attachment.

Email to SMS

If it's easier for you, send your messages without opening up Messenger just by using your email. It's easy to set up by clicking '[Email to SMS](#)' within the settings menu in Messenger. Here you can choose email addresses that can send from your account, the length of messages, default send names and various security settings, then just click '[Activate Email 2 SMS](#)' and save.

Sending messages is then as simple as writing your email and sending to your customer mobile number, like this: 01234567891@txtlocal.com



The screenshot shows the 'Email to SMS settings' page in the text local Messenger 3.0 interface. The page is divided into two main sections: 'Configure your Email to SMS settings here.' and 'Authorised Email Address'.

Configure your Email to SMS settings here.

- Activate Email 2 SMS
- Default From Name: Ben
- Truncate SMS: 4 messages (612 chars)
- Subject Handling: Only send email body, ignore subject line
- Require password in subject field?
- Reply with a confirmation email?
- Buttons: Back to Settings, Save Settings

Authorised Email Address

Email	Sender Name
<input type="checkbox"/> noreply@txtlocal.com	Simple Reply

Buttons: Add Another, Delete Selected, Save Sender Names

API Gateway

If you want to automate your sends by integrating Messenger with other software that you use for your business, then you can use our free API gateway. We provide a large collection of code documentation for a range of programming languages for free on our website, so it's easy to find the code you need. If you're not confident with coding you can just call our technical team for some support.

You can also use our integration with Zapier, which is a portal for non-developers. Zapier enables you to create simple software integrations with just a few clicks. There are over 500 applications available and you can connect any of them to your Textlocal account quickly and easily.

[Learn more here - www.textlocal.com/simple-developer-sms-api](http://www.textlocal.com/simple-developer-sms-api)



Scheduling and segmenting your messages

Scheduling messages

Timing is everything. It's important to consider when your customers will be most receptive to the message they receive, e.g. sending an message promoting a 'buy one get one free' offer on pizzas at 9pm, when people have already eaten, is unlikely to be a success.

Once you have perfected your sender name, message, custom fields and opt-out, tick the schedule box instead of sending immediately. Select the time and date you want to your messages to be sent. These can be scheduled up to 12 months in advance. You can view and amend all scheduled messages in the reports section.

Schedule

4 December 16:00

Staggered sends

When sending larger volumes of text messages, it's important to think about the impact of the responses you could potentially receive. If you sent 5000 text messages all at once, could you handle the increased volume of inbound calls? This situation can be easily avoided.

Place an instruction in Messenger to send the messages between certain times and at a manageable frequency. This example shows the messages broken down into smaller batches and sent every fifteen minutes between the hours of 9am to 5pm.

The screenshot shows the Textlocal Messenger 3.0 interface. The top navigation bar includes Dashboard, Send, Receive, Contacts, Mobile Pages, Ticketing, Surveys, Reports, Settings, Help, and Wizard. The main content area is divided into two panels: '1 Send Message To' and '2 Message Details'. The 'Send Message To' panel shows a search bar with 'Friday Night' and a 'Manage Group' button. The 'Message Details' panel includes fields for Sender Name (Ben), a message template ('WIN VIP Tickets for ORANGE FESTIVAL 16...'), and a message body. Below the message body, there are fields for Schedule (16 February 2016, Europe/London), an opt-out message, and Advanced Options for Segmented sends (09:00 to 17:00, 15min) and Validity (16 February 2016). Buttons for 'Save Message In Drafts' and 'Send Message' are at the bottom.

Validity periods

If your offer or information is time sensitive, set a date and time when the message or offer will expire. If a message has been scheduled and the validity period has expired, Messenger will not send it.

Validity

6 December 11:30

Textlocal Tip
If you're not quite ready to send or schedule your message you can save it as a draft for next time.

Messenger Keeps you Compliant

Opt-outs

We recommend you include an opt-out path on every message sent. This gives the recipient a chance to easily remove themselves from your database, and from any future messages.

Include opt-out message



Optout:



It's simple to stay legally compliant with Messenger

By ticking one box, Messenger will add an 'opt-out' path to every message free of charge, giving you peace of mind. This gives a simple way for the recipient to remove themselves from your database.

By texting your free opt-out keyword to the Short Code, e.g. '**text KEYWORDSTOP to 60777**', that particular mobile number is automatically removed from all of your contact groups and updated in your opt-out list. The number will stay on the opt-out list until the recipient chooses to opt back in.

Are you compliant?

The ICO (Information Commissioners Office) states that organisations may not send a text message if the recipient has not agreed to it (i.e. opted-in), unless the following apply:

- The sender has obtained your details through a sale or negotiations for a sale
- The messages are about similar products or services offered by the sender
- Your customers were given an opportunity to refuse the text messages when their details were collected and, if they did not refuse, you were given a simple way to opt out in all the text messages you received.

Messenger will not send a text to any number on your opt-out list. When you add new contacts into your Messenger account, Messenger will automatically strip out any numbers which have previously opted-out of your messages, and move them in to a separate group.

You can also manually opt-out mobile numbers – perfect if your customers contact you directly with an opt-out request.

Textlocal Tip

Textlocal will make sure your mobile communications are legally compliant.



Need more help?

If you need any further help or guidance using Messenger please call our dedicated support team on **01244 752299** or visit our website **www.textlocal.com** for more help and support.



TEXT US
Text **GO** to **62277**



CALL US
01244 752299



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www.textlocal.com

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