



WELCOME TO
**COMPORIUM
BUSINESS
TEXTING**

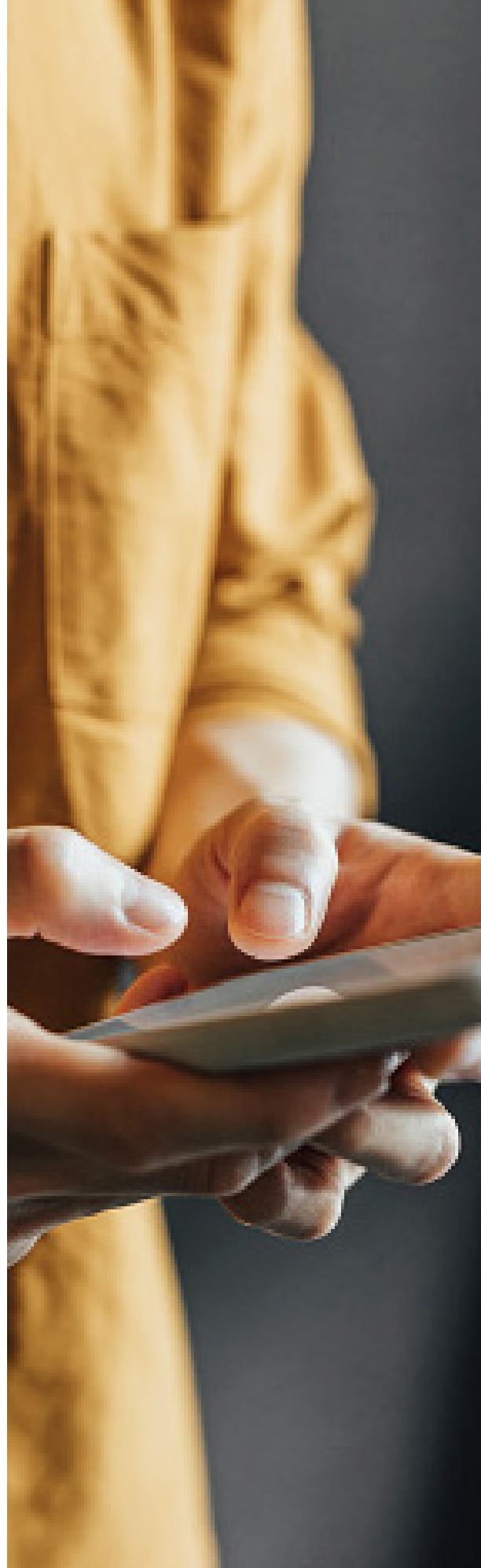


COMPORIUM BUSINESS TEXTING

This guide is designed to get you from zero to send in as few steps as possible. To that end, we'll save some of the advanced functionalities of the Comporium Business Texting services for later.

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WHAT IS TEXT-TO-LANDLINE?

This service gives you the ability to send and receive text messages online using your existing business phone number. There are no changes to your voice service, but there is a significant benefit to your customers who can now reach you at their convenience - not just during business hours or when someone is available to take their call. And, of course, the faster and easier it is to connect, the more likely it is that your customers and prospects will reach out and start a conversation.

Ask your Comporium sales rep about text enabling your business line today!

WHAT IS THE DIFFERENCE BETWEEN MMS AND SMS?

TEXT TYPE	COMPONENTS	PURPOSE
MMS - MULTIMEDIA MESSAGE	Includes 1600 characters and/or an image or video (US only)	Often used for marketing campaigns or to engage contacts
SMS - SHORT MESSAGE SERVICE	Includes up to 160 characters (US) and 136 characters (Canada)	Often used for sending quick messages or is used in relation to emergencies

CONTACTS

Before you send your first text message to any of your contacts, there's an important topic to understand: Compliance.

It's crucial to know that any and all of your contacts need to opt in to receive your text messages. In other words, they need to grant you permission to contact them on their phones. If you text people without their explicit permission you are essentially sending them spam.

How to Add Contacts

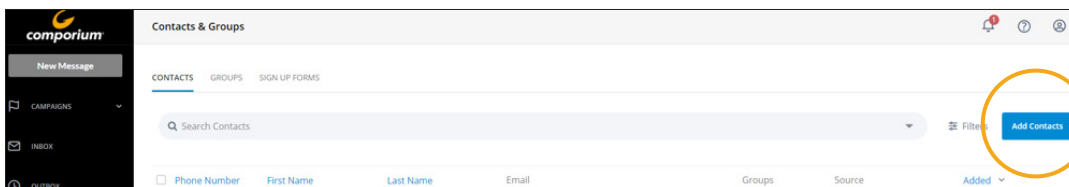
There are two primary ways to add contacts: individually or you can bulk upload them from a spreadsheet.

How to Add Individual Contacts

1. Log in to your Comporium Business Texting account.
2. On the left navigation, click **Contacts**.
3. Under Contacts, click **Add Contacts**.
4. Complete all the information, consider adding them to a **Group**, and then click **Save**.

How to Bulk Upload Contacts From a Spreadsheet

1. To start, navigate to the **Contacts** option from the left navigation menu and select **Add Contacts** from the top navigation.



2. Select **Upload** in the top menu. You can drag your contact spreadsheet into the field to upload it, or browse for the file.
3. Now, this third step called **Mapping** is very important. After you upload your contact list, use the dropdown menus to map the contact information to the appropriate fields within your Comporium Business Texting account. Phone Number is the only required field. First Name, Last Name, Email, and Notes are the other default options.

*Note: If you need additional data fields, you can create up to 5 custom fields. To do that, click the **Add New Contact Fields** link at the bottom left or select **Add Contact Field** from the dropdown menus at the top of each column.*

4. After defining the field, click the **Create** button.
5. When your fields are mapped and created, click the **Continue** button at the bottom of the page to move to the next step.

HOW TO SEND A TEXT MESSAGE

1. Create a message and choose recipients

- Click on **New Message** on the left panel and choose either a Group Text, 1-1 Chat or Voice Message.
- Click the **To** field and choose the contact(s) or group(s) you want to send a text message to.
- You can also add individual contacts by typing in the name(s) or number(s) followed by a comma to separate them. The names, group names, or numbers will highlight in blue if the system recognizes the contacts.
- Manually type additional or alternative recipient phone numbers separated by commas, in 10-digit format with no spaces or symbols (i.e., 6789313113).

2. Add a company name

The first part of your message is your **Company Name**. This field is optional, but adding your company's name is a good habit to get into as it lets your contacts know who the message is from - the Company Name appears in parentheses before the incoming text message. You can update your Company Name by typing it directly into the Company/Group field on the New Message page. Or, you can update it in your account settings under the Profile Icon in the upper right.

Note: Adding a Company Name will come from your total character count so keep it brief!


3. Personalize your message and allow contacts to unsubscribe as needed

By clicking on the below personalization image, you can use the contacts First Name and/or Last Name.

4. Auto-append STOP message

For group messages, you will need to give users the option to reply "STOP" to opt out. Contacts can reply "STOP" to a text at any time in order to no longer receive texts from your account. We recommend that you end your text message with a phrase like "Reply Stop to Opt out" so that your contacts have clear instructions on how to remove themselves from your contact list.

Or, check the **"Add STOP to end message"** check box. When they reply "STOP" to your text, your contacts are automatically added to your opt-out list. This list is saved on your Contacts page so that you won't have to worry about accidentally texting someone who has already opted out.

- The easiest way to allow contacts to opt-out or unsubscribe is by choosing the **Unsubscribe** option, using the personalize button, shown here. 

HOW TO SEND A TEXT MESSAGE *(continued)*

5. Write a message (MMS or SMS)

SMS messages are limited to 160 text characters each (including spaces), while MMS (multimedia) messages can include images and may be up to 1600 characters in length. Simply type your message of choice that best speaks to your audience.

6. Send now or schedule delivery

Set a delivery time using the **Schedule For Later** option, or you can choose to send immediately! After you have sent your message, go to your **Outbox** to see the **Delivery Reports** page.

*Note: Messages are sent based on the time zone set on your account. You can manage your time zone by clicking the account management **Profile Icon** in the upper right and then clicking **Personal Info**.*

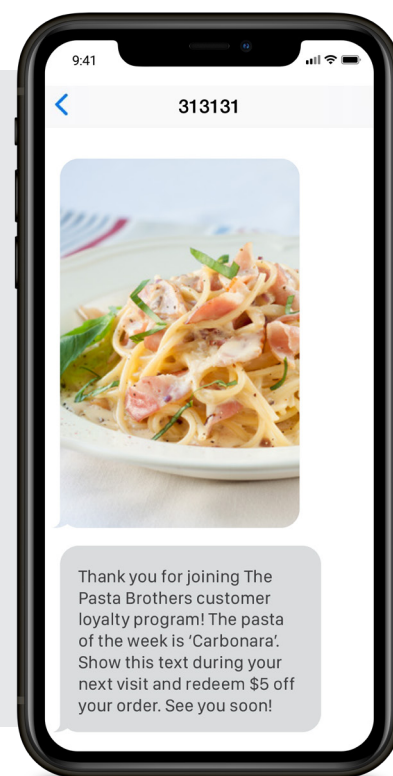
BEST PRACTICES FOR SENDING A GROUP TEXT

Promote your business like a pro:

- Send at least one message a month to keep your business top of mind.
- Pictures are worth a thousand words, so consider sending an MMS message instead of an SMS message.
- Tell your customers what you want them to do – always include a call to action, such as a link to click, a phone number to call, or an address.
- Focus on high-quality offers too good to pass up – coupons, discounts, or BOGO offers are always crowd favorites.

Send people reminders to avoid missed connections and no-shows:

- Send reminders at least 24 hours before appointments.
- Give customers the option to confirm or reschedule (if applicable).
- Don't forget to add a Company Name so they know who you are.



SENDING GROUP MESSAGES

ADVANCED FEATURES

USE A TEMPLATE

Message Templates allow you to save your favorite text messages for future use. When you want to use them, simply select one and it will load right into the **Compose Message** page. You can even make tweaks each time you use it. On the **New Message** page, click on the **Message Template** icon as identified to the right.

Here you have the option of **Creating A New Template** (which saves your current message) and/or **Creating A Custom Template**.

ADD A PICTURE (MMS)

Photos added to SMS messages (text only) will be inserted as a link. To include the photo as an image in the message body, choose **MMS**, and then click **Upload New File**. When you use MMS in a message, 2 credits are applied to each contact message.

ADD LINK SHORTENER

Add a link to your text and track how many people have clicked on it.

Message

Company Name (optional)

Type your message

{...} [Message Template] [Image] [Link] [Smiley]

CUSTOM TEMPLATES

CREATE NEW TEMPLATES

Save current message as a new template

Enter a name for this new template

Once this text message is sent or scheduled, it will be saved as a template for future use. You can find it again in the Custom Templates tab.

Done

Message

Company Name (optional)

Type your message

{...} [Message Template] [Image] [Link] [Smiley]

Message

Company Name (optional)

Type your message

{...} [Message Template] [Image] [Link] [Smiley]

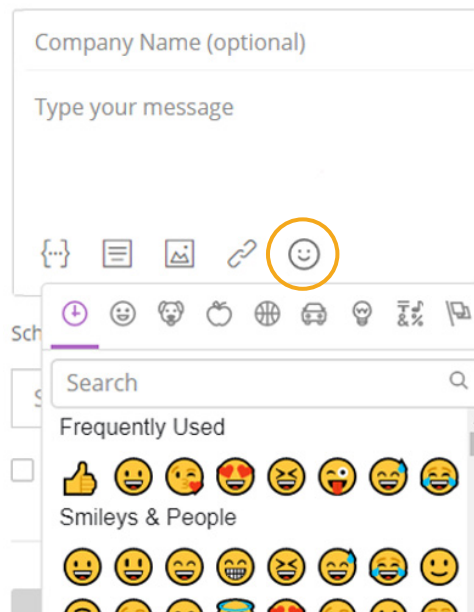
SENDING GROUP MESSAGES

ADVANCED FEATURES *(continued)*

USE EMOJIS

Using emojis is a great way to make a personal connection with your audience. Click on the smiley icon at the bottom of the message to see your emoji options.

Message



CREATE A RECURRING MESSAGE

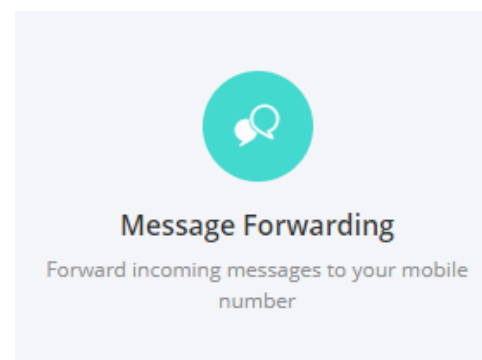
Designate a message to be sent at a regular interval to a specific Group or Groups. Specify a limited or infinite number of recurrences. These can be created or stopped by clicking on **Campaigns** on the left panel > **Recurring Texts**.

Schedule



MESSAGE FORWARDING

Have your incoming messages forwarded to your phone or email so you always know when you get a response. Click on **Tools** and then find the **Message Forwarding** option.





HOW TO RECEIVE MESSAGES IN 1-ON-1 CHAT AND VIEW INCOMING MESSAGES

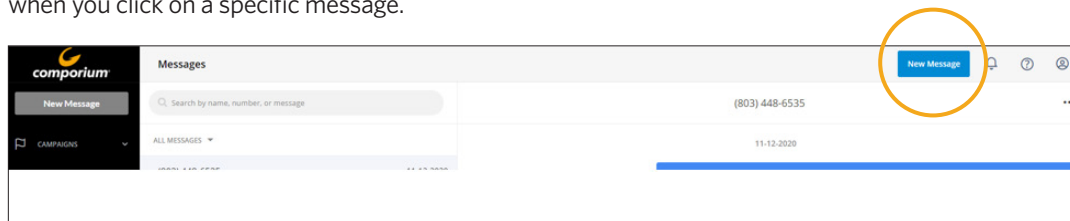
When you receive a text message to your 10-digit phone number, you will be able to see it in your Inbox: *Note: If you're searching for a conversation, only one parameter can be searched at a time (first name, last name or phone number).*

Option 1: Click on a message in your Inbox to open it.

If the recipient is not in your contact list, you can edit the contact by checking the box beside the message. Then choose **Contact** at the top and click on **View Contact**. You will then be able to edit the contact information. You can also **Assign them to a Group** or **Opt Out** the contact. See more about Opting Out contacts on the next page.

Option 2: Click on the New Message button at the top right of your dashboard screen.

You will see all messages listed on the left side and message content on the right side when you click on a specific message.



DELETING CONTACTS VS OPTING OUT CONTACTS

Removing contacts will help you stay organized and also save credits! First, it is important to know the difference between opting out contacts and deleting them. **Contacts must be opted in or subscribed in order to receive text messages from you.**

WHAT'S THE DIFFERENCE?

- **Opting Out:** Blocks the contact from receiving messages unless they opt back in by texting in your keyword.
- **Deleting:** Removes the contact from your list but you have the option of adding them back manually.

HOW TO DELETE CONTACTS

Deleting contacts gives you the option of adding contacts back manually if you decide to keep their number. This is entirely different from opting out since the contact will not have to opt back in using a keyword to be added back to your list.

- **Contacts page** - Search for the contact and check the box next to the contact you wish to delete.

*Note: Check the top box next to **Phone Number** to select all contacts on the page at once and/or toggle the **Rows Per Page** option to display more contacts on one page.*

Note: Removing Contacts in multiple groups: There may be a time when you want to delete contacts that are overlapping into another group. You could go to your delivery report and click on **Bounced** which will then give you an **Export These Contacts** option. If you export contacts from a report and upload them to a new group, you can delete all contacts in that new group and remove them from your database.

HOW TO OPT-OUT CONTACTS

If a contact is opted out, they will be blocked from receiving text messages from your number. Even if you try to upload their contact information again, the system saves it so you won't have to.

There are a few ways to opt out a contact, or to give them the option of opting out themselves:

- **Giving your contact the option to opt out** on their own saves you time. We recommend that you use our auto-append reply "STOP" at the conclusion of your text messages. When a contact replies "STOP" to your text, they will automatically be opted out from your contact list. Other automatic opt-out words/phrases include "Remove," "Cancel" or "Take me off your list."
- **Delivery Report** - Your outbox shares valuable information about what messages were received and which ones may have bounced. To view a report, click **View Report** to the right of the sent message in your outbox. Click directly on to the word **Bounced** in your report. To the right, you will see the option to **Opt Out These Contacts**.
- **Under Contacts, search the contact** by first name, last name or number and check the box next to the contact you wish to opt out. You will see an **Opt Out** button appear at the top.
- **Inbox** - You may notice some individuals in your inbox that don't use the automatic opt-out words and say something like "I don't want any" instead. Or, they may have asked you to opt out through a platform other than texting. If you see their contact in your inbox, you can select the three dot ellipsis and click **Opt Out Contact**.

KEYWORDS

HOW TO ADD KEYWORDS

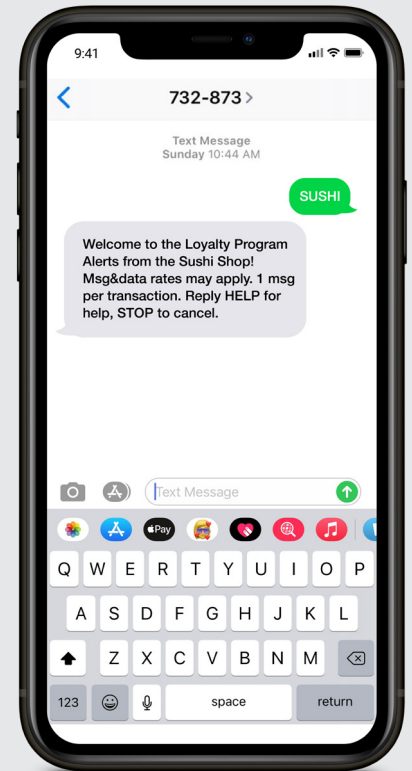
A keyword is a unique code that contacts can use to opt into your account automatically by texting it from their phone. Once you subscribe to a keyword with your sales account rep, use the steps below to create it.

1. From the left navigation panel, click **Keywords & Numbers**.
2. Click **Get Started** if this is your first keyword or **Add Keyword** if you already have at least one.
3. Type the keyword you want in the text box, and then click **Search**.
4. If the keyword you want is available, we'll let you know and you can click **Activate Keyword** to secure it.
5. Next, add your keyword contacts to a **Group**. That way, all leads that text in your keyword will automatically be added to a contact list in your account.
6. If you're setting up a new group for your new keyword (recommended), we'll walk you through creating an **Auto Response** for contacts that text your keyword. Please note that this is required by the wireless carriers and must always include opt-out instructions.
7. As part of the new group, we'll give you the opportunity to set up customized **Reply Settings** and **Advanced Features**. After you have completed these steps, click **Continue**.

EDITING YOUR KEYWORD SETTINGS

Keyword Setting Components:

- **Connect to Groups** - Automate what contact list they are added to.
 - **Create Your Auto-Reply Message** - This is the response message your contacts will receive.
 - **Reply Settings** - Extended optional reply settings.
 - **Advanced Options** - additional settings for API or forwarding keyword messages to your email.
1. To edit your keyword, go to **Keywords & Numbers** on the left panel and click directly on the keyword you wish to edit. After clicking on the keyword, you will see the settings page.
 2. Click the **Edit** button to the right to edit a certain part of your keyword settings.



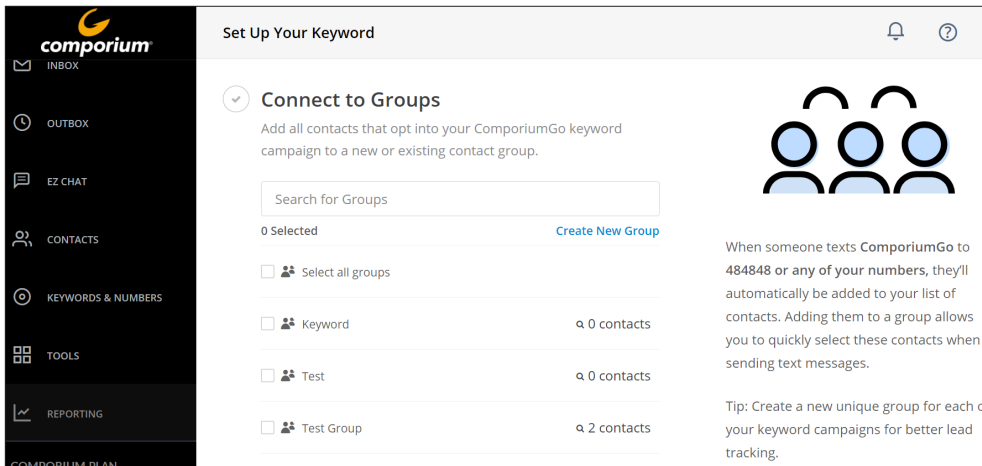
KEYWORD BEST PRACTICES

Contacts can text in your keyword using uppercase or lowercase letters. Advertising your keyword in all uppercase letters is recommended so that your contacts know exactly what to text. Please note that the best practice is to choose a ONE-WORD keyword. If your keyword is a double-word, make sure that your contacts text in the full keyword correctly with no spaces to avoid having them opt into the wrong account.

KEYWORDS *(continued)*

CONNECT TO GROUPS

This step is important because it allows your contacts to automatically be added to a contact list when they opt in so you won't have to do any extra work! When someone texts in a keyword connected to a specific group, you can later text that entire group at once with text updates.

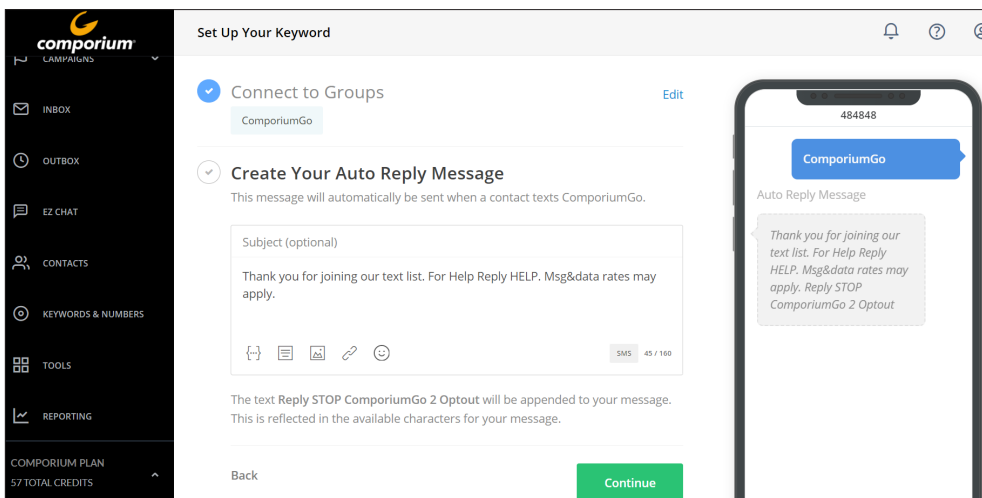


CREATE YOUR AUTO-REPLY MESSAGE

An auto-reply must be sent every time someone texts in a keyword. Click into the **Auto Reply** box to create your own text-list message that you want to send your contacts. You can incorporate a link to a web page or attach an image if you have MMS capabilities on your account.

Note: For compliance reasons, the reply STOP message must be included in the reply.

Auto-replies cost 1 credit per message as Comporium Business Texting only bills outbound messages.*



After you have **connected your keyword to a group** and **created your auto-reply message**, you can click **Save** and skip the following steps if you don't wish to automate your keyword any further.

CAMPAIGNS

DRIP CAMPAIGNS

A drip campaign is a series of automated messages sent to a contact once they join a contact list. Using drip campaigns is a great way to save time, engage your contacts and/or streamline information. If you want to provide your contacts with a series of pre-scheduled messages on a regular basis, then this is the perfect tool to use.

How To Create a Drip Campaign

1. Name Your Campaign

Click **Campaigns** on the left panel, and then select **Drip Campaigns** in the drop-down menu. Then click **Create Campaign**. You will be brought to a page that allows you to create a campaign name. The campaign name will allow you to keep track of which campaigns are running from your Comporium Business Texting account. This name or title will not be available to the contact receiving your messages.

2. Connect Your Campaign to a Group

The group or contact list you connect to the campaign will be the one contacts must join in order to receive your series of text messages. This **group must be empty** to begin with to ensure that only new contacts added will receive the drip based on the timeline of messages you have created. Feel free to **create a new empty group** if the one you desire is not listed. After you have added the new or empty group, you can add the contacts that you would like to start receiving messages from your drip campaign. Or, you can **connect your drip campaign to a keyword**. Scroll down below to learn how to connect it to a keyword.

3. Create Your Messages

Write your message(s) and/or add an image the same way you would on the **New Message** page. A preview of what your messages will look like will appear to the right.

4. Schedule Your Messages

Select the hours/minutes or days in which you would like the contact to receive each message. Each message you create will begin from the time in which a contact joins the campaign. Depending on when they join, they will receive the first message of your series at the time established in your campaign depending on their **time zone**.

5. Review Your Campaign

A preview of your messages will appear in the phone icon to the right of your screen. You will also see a description displaying when each message will send. Click **Launch Campaign** when you are ready to activate the drip campaign. If you clicked **Finish Later** to save a draft, you can always go back to launch it when you are ready. When the campaign is launched, it will show its status as **Active** to the right on the drip campaign dashboard.

HOW IT WORKS

**CUSTOMER
SIGNS UP FOR TEXT
MARKETING**



**FIRST DRIP
EDUCATE YOUR
AUDIENCE**



**SECOND DRIP
OFFER A FREE
DISCOUNT**



**THIRD DRIP
SUGGEST A NEW
PRODUCT**



**FOURTH DRIP
SEND A COUPON
OR PROMOTION**

CAMPAIGNS

DRIP CAMPAIGNS *(continued)*

Editing Your Drip Campaign

To edit a campaign, go to **Campaigns > Drip Campaign**. Then, click on the title of the campaign. You will see the option to **Delete** or **Edit** each message in the campaign. To stop a campaign, go to the drip campaign dashboard and click on the **Stop** button to the right of the campaign under the **Actions** column.

Connecting a Drip Campaign to a Keyword (automatic opt-in)

Keywords allow contacts to subscribe to your contact list automatically. So, if someone texts in a keyword that is connected to a drip campaign, they will then begin to receive messages from the drip campaign series automatically. If you would like to create a new keyword, go to **Keywords & Numbers** and select **Add Keyword**.

To connect your keyword to a drip campaign:

- Go to **Keywords & Numbers** and click directly onto the keyword.
- Select **Edit** next to **Connect to Groups**.
- Choose a group that has 0 contacts or select **Create New Group**. This group must be the same group that will be connected to your drip campaign.
- Click **Save**.
- Now, go back to **Campaigns > Drip Campaigns** on the left panel. Then, assign the drip campaign to the same group that is connected to your keyword.

Adding Existing Contacts to a Drip Campaign

You may have contacts in your account that want to be a part of your campaign but didn't opt in with a keyword.

- Simply go to **Contacts** and check the box next to the contact you would like to add to the campaign.
- Choose the **Add To Group** button.
- After the contact has been added to the group connected to the drip campaign, they will begin to receive the series of messages for that campaign.

CAMPAIGNS

REMINDER CAMPAIGNS

Reminder Campaigns are automated campaigns that allow a user to automatically schedule messages in relation to a specified date and time.

Typical Uses

- Payment reminders
- Birthday/anniversary reminders
- Annual checkup reminders
- Appointment reminders

How To Create a Reminder Campaign

1. Click **Campaigns** in the left navigation menu and select **Reminder Campaigns**. Click the **Create Reminder Campaign** button.
2. **Select the Caller ID for your reminder messages.** This is the number that message recipients will see as the sender message.
3. **Campaign Name.** Create a name that you'll remember for the Reminder Campaign.
4. **Compose your message.** Want your auto reminder to include something personal? Address your contacts by name by adding a personalization token. You can also choose a message template, add an image, and add a link. Just click on the icons at the bottom of the message field.
5. **Choose your settings.** Continue by pressing the **Create Reminder** button at the bottom of the page.
6. **Add contacts to your campaign.** Upload a spreadsheet (csv, xls, xlsx) containing the phone numbers and dates for each of your contacts that should receive this reminder.
 - Download our pre-formatted template by clicking the **Download Reminders Template** button. Then copy and paste your data into the correct columns. Upload the file you create by dragging and dropping or by browsing on your computer.
7. **Contacts Preview.** You will be able to preview how your contacts look so that you can make any updates before you finish setting up. Click **Continue**.
8. The system will import your contacts and schedule your reminders.
9. **View Campaigns.** If you wish to see the Reminder Campaigns you have active, click the **Scheduled** tab of your outbox, or go to **Reminder Campaigns** in the **Campaigns** navigation menu.



POLL & VOTE

Our **Poll & Vote** feature allows you to run Text-2-Vote campaigns using Keywords. As long as you have an active Keyword in your account, you can create a poll in a few quick steps. For your recipients, voting is as simple as texting back your keyword along with their vote. For example: if you had the Keyword MYVOTE and you wanted to ask people what color was the best – red, green or blue – your clients would text in entries like 'MyVote Blue' or 'MyVote Red'.

Please note: The poll must be advertised to your contacts so they know how to vote or you can send them a text to tell them how they can text in their vote.

The first thing you'll do is name your poll, choose an end date (you can leave your poll open-ended if you like), and set your choices.

1. Under **Campaigns**, go to **Poll & Vote**. Then select **Create New Poll**.
2. Choose the **Keyword** you wish to use for your voting campaign. Your voting recipients will be texting in this keyword along with their voting choice.
3. Now that you have chosen the keyword to use for your poll, **connect the poll to a group**.
4. **Name your poll** and list the five choices.
Note: If you need more than five choices, create a text with choices connected to a sub-keyword instead.
5. The poll module will automatically set up a Sub-Keyword for each choice in your poll.
6. Choose when you would like the poll to end. Or, you can leave this field empty if you want to keep the poll running.
7. Create your auto-reply message that recipients will receive when they have successfully texted in their votes.

Other options include texting the winning result to all voters and allowing multiple votes per person. Once you start your poll you can watch the votes in real time. When the poll is over you can export the results as a CSV.

COMMON POLL & VOTE QUESTIONS

Q. What if I don't have any Keywords?

You can set up a new Keyword to use with your poll.

Q. What happens to my Keyword settings if I use an existing Keyword for my poll?

Those settings are turned off for the duration of the poll. Polling relies on a Keyword and Sub-Keywords, so features like send-from-phone, API and pre-existing sub-Keywords must be disabled.

Q. If someone texts a vote into my poll who isn't a contact, will they be added to my list?

Yes, and when you set up your poll you can choose the group for poll entry opt-ins.