# Vodafone Bulk Text

# User Guide

## Copyright Notice



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**Author**

This document was prepared and issued by Phonovation Ltd. Any comments or questions in connection with the document should be addressed to [InteractSMS.support@phonovation.com](mailto:InteractSMS.support@phonovation.com).

# Contents

# 1. Glossary of terms

Many words and phrases used in this document have a special meaning in the context of Bulk SMS.

This section defines some of the most important terms used.

**Parent account:** A parent account is an account that has been set up with the ability to administer and manage child accounts. A parent account will have the ability to allocate credits, view message transactions, set sender IDs, etc.

**Child account:** This is an account created by an administrator or a parent account holder. A child account has the same functionality as a standard client, but is administered and managed by the parent account holder.

**Campaign:** A campaign is an SMS message broadcast.

**Opt out:** This refers to the methods by which individuals can avoid receiving further messages or information from a Vodafone Bulk Text account.

**Smart tag:** Smart tags are a feature that allows you to automatically populate your messages with values from a Microsoft Excel© file.

**Filter:** Filters are a feature that allows you to send campaigns to specific segments of a saved list.

**Shortcode:** A five digit number which is easy to remember. The Vodafone Bulk Text shortcode for opt outs is 50124.

**Longcode:** A mobile number presented in the traditional length and style for a specific country, used for SMS responses. The Vodafone Bulk Text longcode for responses is 00353879489425.

**Post-paid bundle:** The credit bundle purchased is charged to the Vodafone Bulk Text account and the cost will be added onto the bill.

**Sender ID:** Sender ID, also known as Originating Address (OA) is the number or name that is displayed on the recipient's mobile phone when an SMS is received.

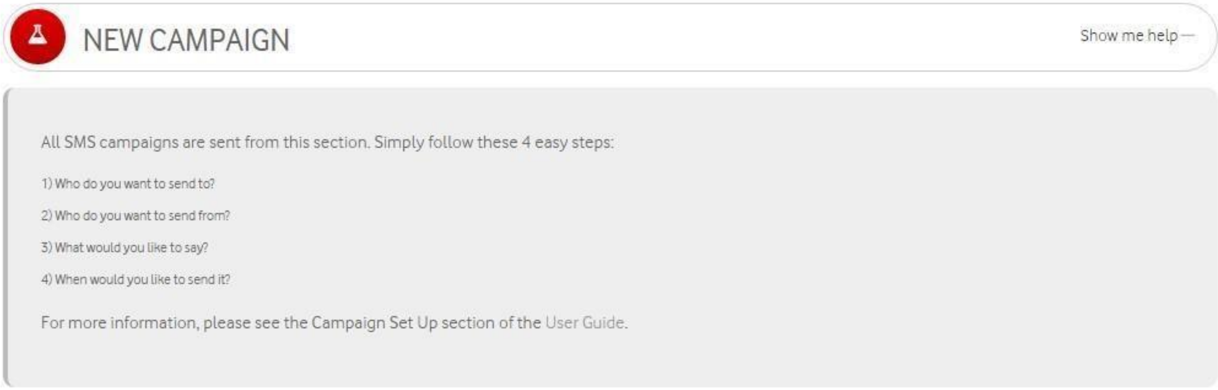
**API:** This Bulk SMS API (Application Programming Interface) product provides an interface between your existing systems and Vodafone Bulk Text messaging gateway.

For more information on how using the SMS gateway API can help your business, please contact your account manager.

**SMS:** Short Message Service (SMS) is an text messaging service component of phone, web or mobile communication systems, using standardised communications protocols that allow the exchange of short text messages between fixed line or mobile phone devices.

# 2. Support SMS videos & 'Show me help' sections

Most sections offer a support text and some contain a How-To video in the **Show me help** sections. They can be accessed by selecting the 'Show me help' icon on the top right hand side of each page. To close the support information, simply click the 'Show me help' box again.




Support videos are available for certain Vodafone Bulk Text features. Where a video is available it will be displayed as a **Show me how** link beside the relevant feature.

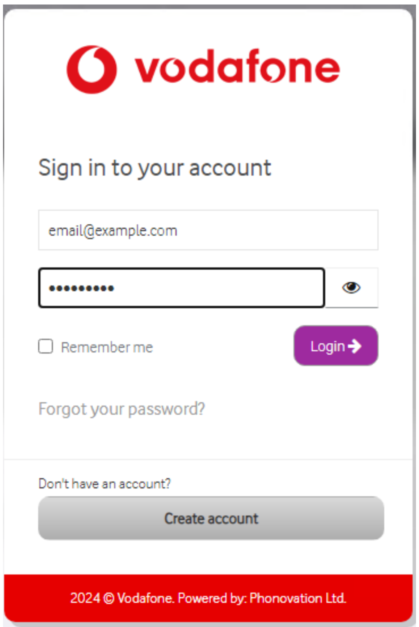
| | |
|---|---|
| **Support video available:** | A SMS box like this one will be displayed in each section of this user guide where a support video is available |

# 3. Initial Login

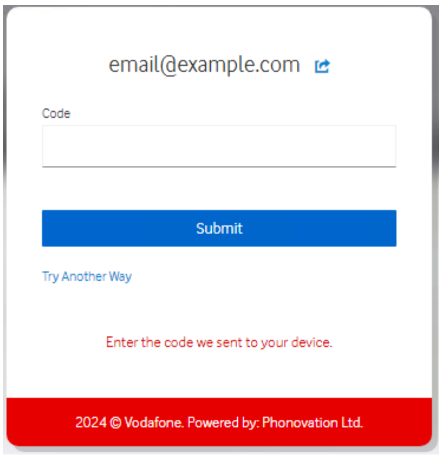
Registered users can log into the Vodafone Bulk Text application by going to the following URL:

https://bulktext.vodafone.ie/

Once at the login screen you can enter your **Username** and **Password** details. The Username will be the email address that you supplied during registration. Once your details are entered, select the **Login** button.



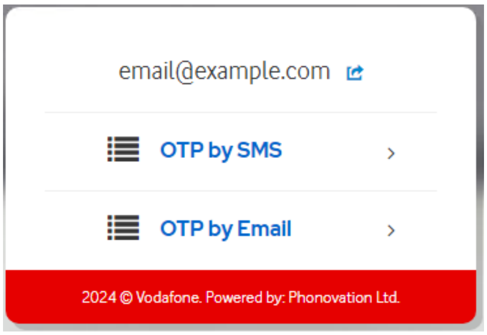

A code will be sent to the user's mobile number. Enter this code into the empty field and select the **Submit** button.



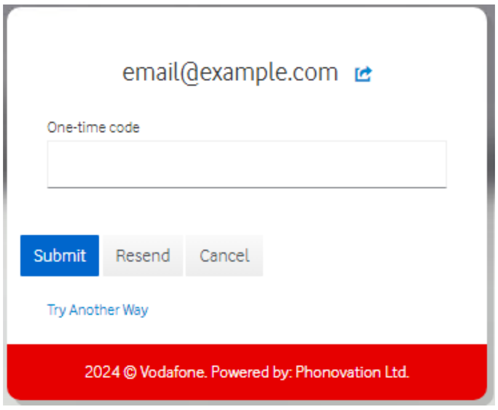

If the code is not received via SMS, choose an alternative method (ignore the next three steps for email if the code is received via SMS).

1. Select the **Try Another Way** option under the **Submit** button

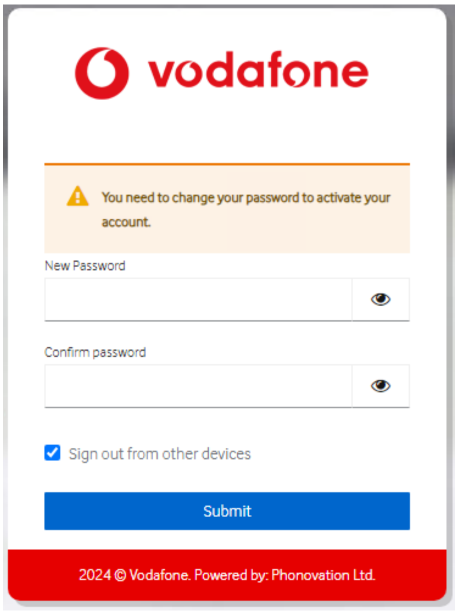
2. Select **OTP by Email**.



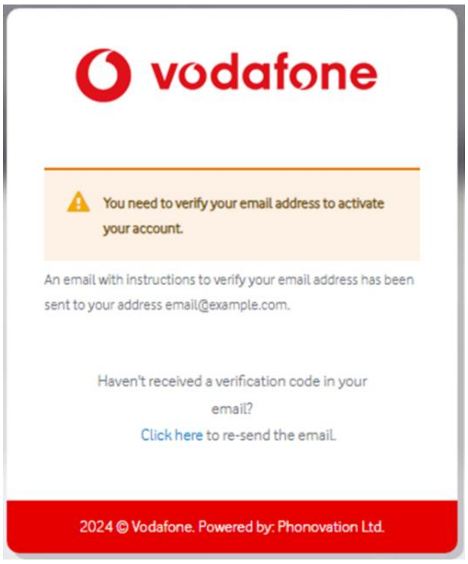

3. A code will be sent to the user's email address. Enter this code into the empty field and select the **Submit** button.



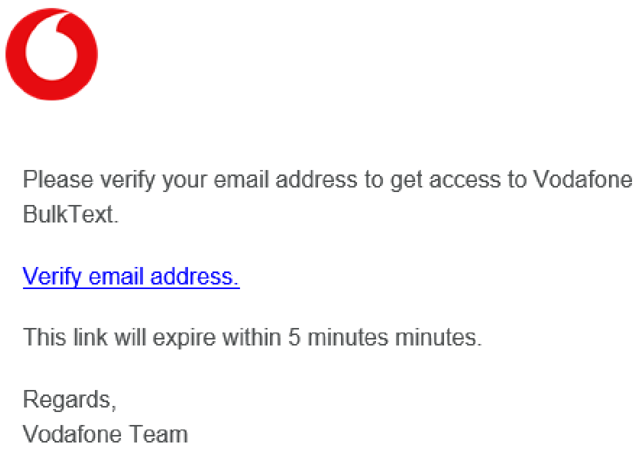

The system will prompt for a new password. Please ensure the new password is secure.



A verification email will be sent to the registered email address.




Please click the link (**Verify email address**) to verify your email address to complete the login process. If the link doesn't work, copy and paste it directly into your browser's address bar.

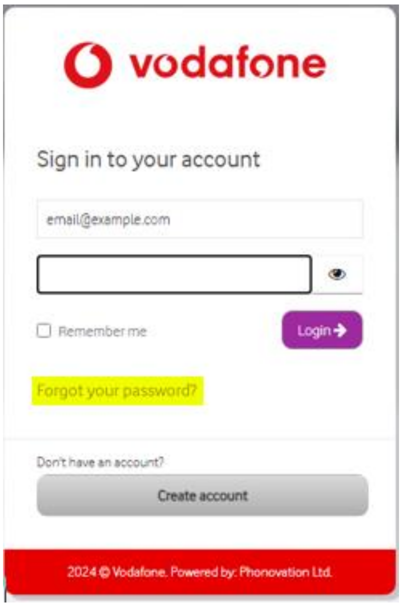


# 4. Forgot your password?

In the event that you have forgotten your password details you can gain access to the system by having your password reset.

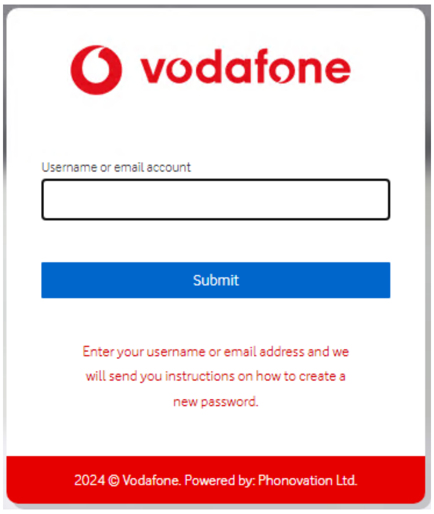
To do this, you are required to carry out the following:

- Select the **Forgot your password?** link located on the **Login** page.



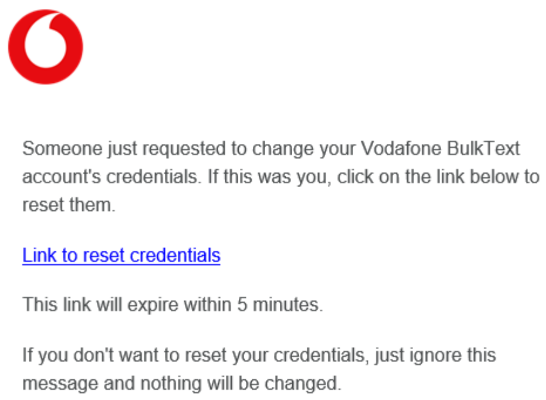

- You will be redirected to the **Forgot your password?** screen.

- If you know your login name (username) you can enter it here.

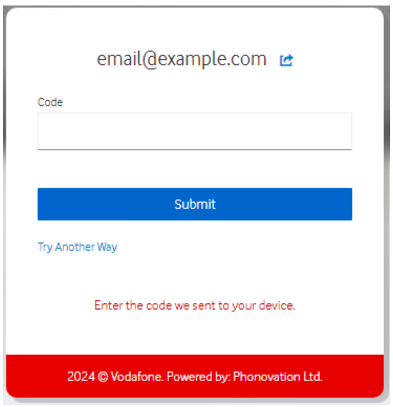


- After entering the correct details, click the **Submit** button.

- An email containing a reset password link will be sent to you. Select the link (**Link to reset credentials**) to reset the password. If the link doesn't work, copy and paste it directly into your browser's address bar.



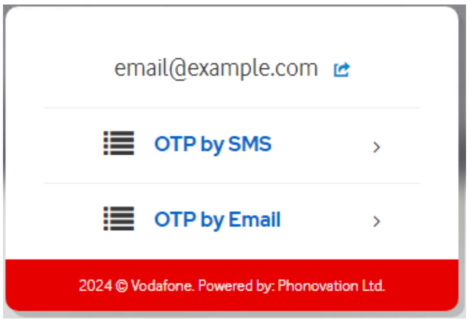

- After selecting the link, a code will be sent to the user's mobile number. Enter this code into the empty field and select the **Submit** button.



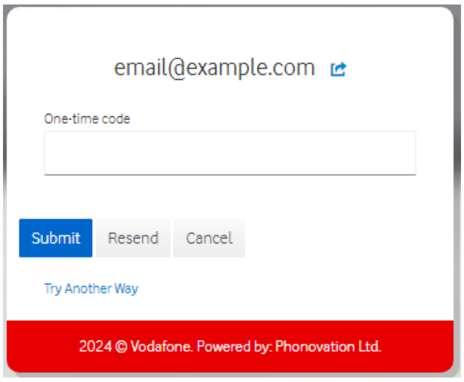

- If the code is not received via SMS, choose an alternative method (ignore the next three steps for email if the code is received via SMS).

  1. Select the **Try Another Way** option under the **Submit** button

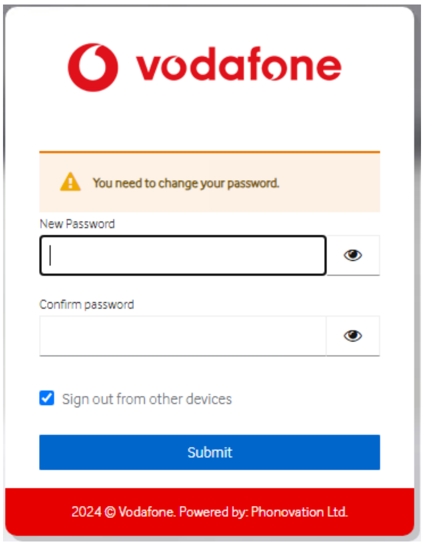
  2. Select **OTP by Email.**




3. Enter the code received via email and select the **Submit** button.




- The password can then be reset to a password of your choosing.

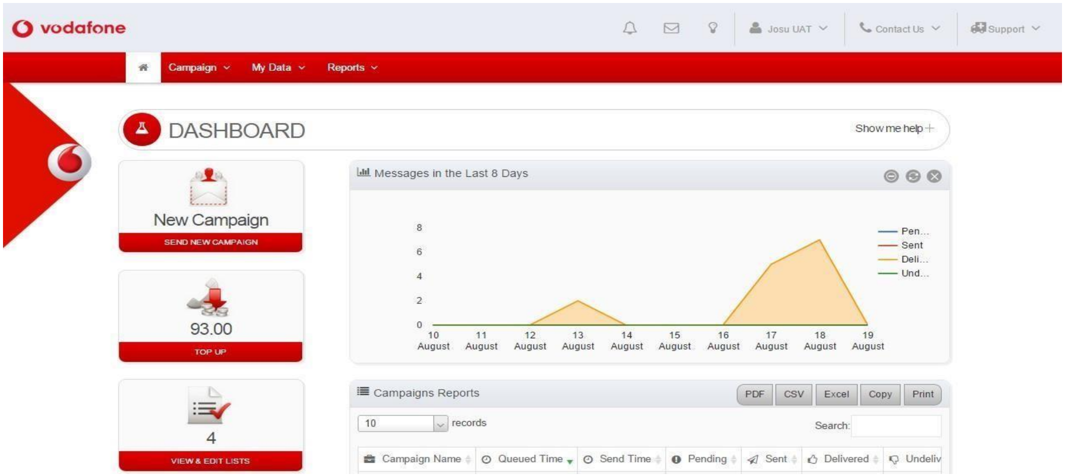


# 5. Dashboard

**The main site has three main menus:**

1. Campaigns – For sending all SMS campaigns.
2. My Data – For all data relating to your account.
3. Reports – For analytics on previous campaigns.

The Dashboard provides an overview of your account and Vodafone Bulk Text activity.




Select the dashboard from the top menu bar. Once selected, the following will be displayed:

**New Campaign:** Select this to send a new SMS campaign. Please see section on **Campaign Set Up**.

**Top Up:** Displays the number of SMS credits currently in your account. Select this to top up your account. Please see section on **Top Ups**.

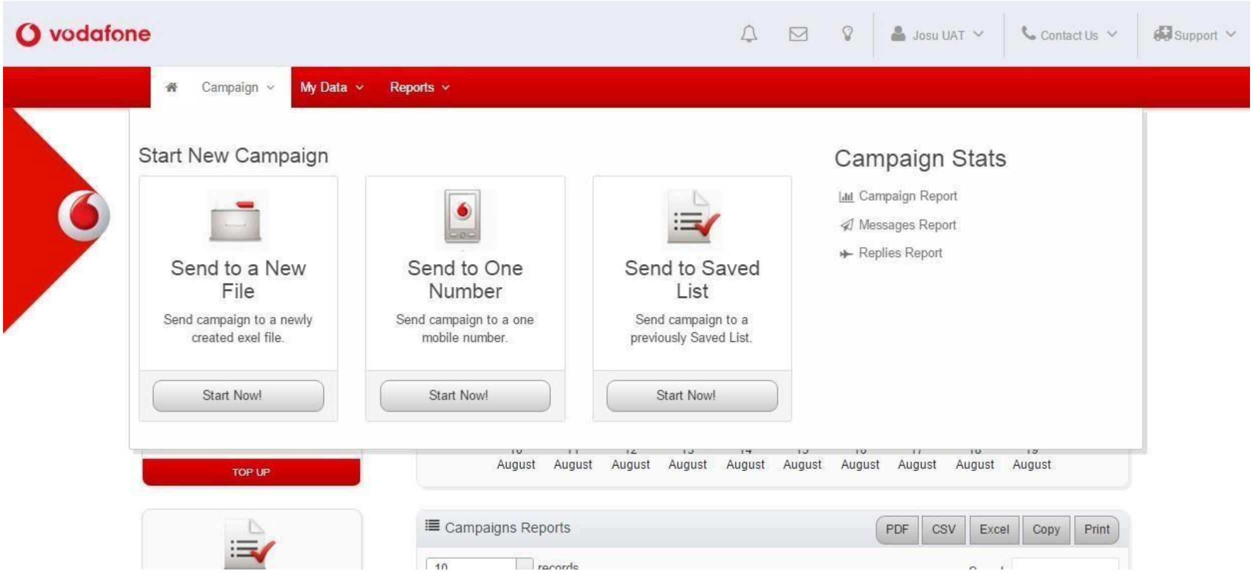
**View & Edit Lists:** Displays the number of saved lists in your account. Select this to visit the Lists page where you can view, edit and create lists. Please see section on **Lists**.

**View Reports:** Select this to visit the **Reports** section where you can perform in-depth analysis of your Vodafone Bulk Text activity. Please see section on **Reports**.

**Messages in the last 8 days:** This graph displays how many messages were sent from your Vodafone Bulk Text in the last 30 days. This report can be viewed in more detail in the **Reports** section.

# 6. Campaign Set Up

To send a campaign, select **Campaign** from the top menu bar.




There are three options when sending a campaign: **Send to a New File**, **Send to One Number** and **Send to Saved List**.

**Send to a new file:** This option allows users to send an SMS campaign to contacts from a Microsoft Excel© file. Basic files will contain only the mobile numbers of contacts. Advanced files may contain the Message text to be sent to contacts and/or the scheduled dates and times to send messages. New files can be saved to use as saved lists.

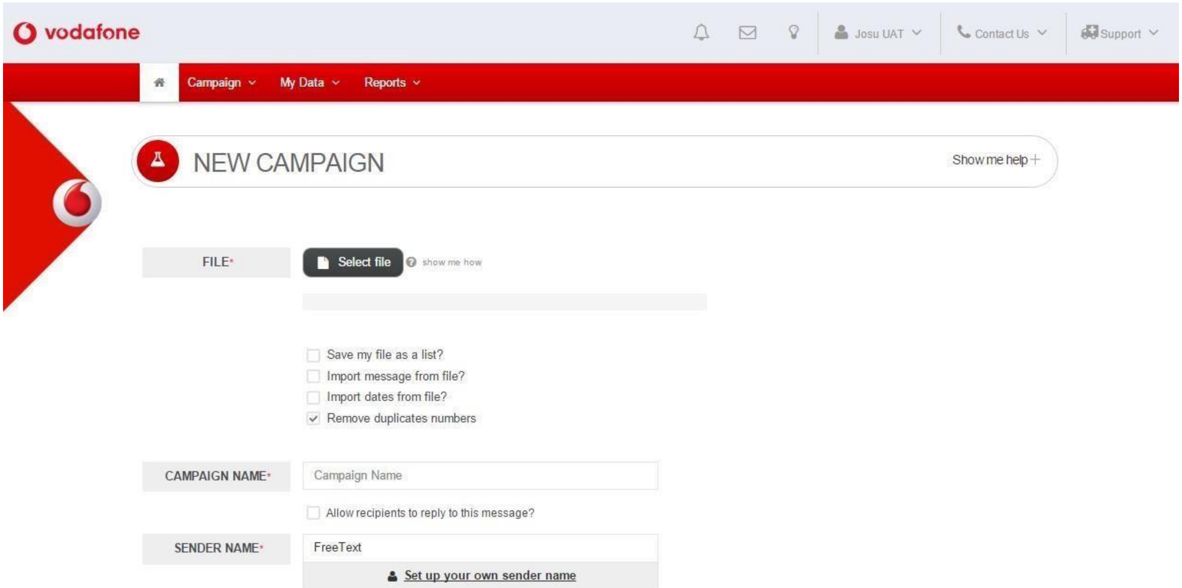
**Send to one mobile number:** This option allows users to send a message to one mobile number.

**Send to a saved list:** This option allows users to send an SMS campaign to a saved list of contacts. Basic lists will contain only the mobile numbers of contacts. Advanced lists can contain any relevant information relating to your contacts. Unlike sending to a new file, sending to a saved list can use **Filters** to send to a segment of a saved list. Please see sections on **Filters**.

## 6.1 Send to a new file

This option is used when you have a list of numbers contained in a Microsoft Excel© file (.xls or .xlsx). This list can be uploaded and an SMS campaign sent to the contacts contained in it.

To send a message campaign to a Microsoft Excel© file, select **Send to a new file** from the **Campaign** menu on the top menu bar. The **Send to a new file** page is displayed as below.




Users will be required to follow the 4 steps on the **Send to a new file** screen to send their message campaign:

- Step 1. Campaign recipients
- Step 2. Sender name
- Step 3. Message text
- Step 4. Send time

These steps will be explained in more detail in the following sections.

### *6.1.1 Step 1. Campaign recipients*

You will be required to enter the following information relating to whom the campaign will be broadcast to:

| **Note:** | Files must be saved in Microsoft Excel© format (xls. or xlsx). |
|---|---|

| | A |
|---|---|
| 1 | 353850000001 |
| 2 | 353850000002 |
| 3 | 353850000003 |
| 4 | 447700000004 |
| 5 | 447700000005 |
| 6 | |

#### 6.1.1.1 Select Excel© file

First you will be required to choose the file that you want to upload. The application allows you to upload Microsoft Excel© files only (xls. or.xlsx). The Microsoft Excel© files need to be formatted correctly prior to being uploaded.

Basic files will contain only the mobile numbers of contacts in the first column.

Mobile numbers (Column A) must be formatted in the following way.

1. The contact numbers **must** be placed in the first column (**Column A**) of your Microsoft Excel© file.

2. The number should be formatted with the full international code. For example, 00353850000001 or 353850000001.

3. You may need to format the first column (**Column A**) of the Microsoft Excel© document. Please see sections on **Formatting the number column (Column A)**.

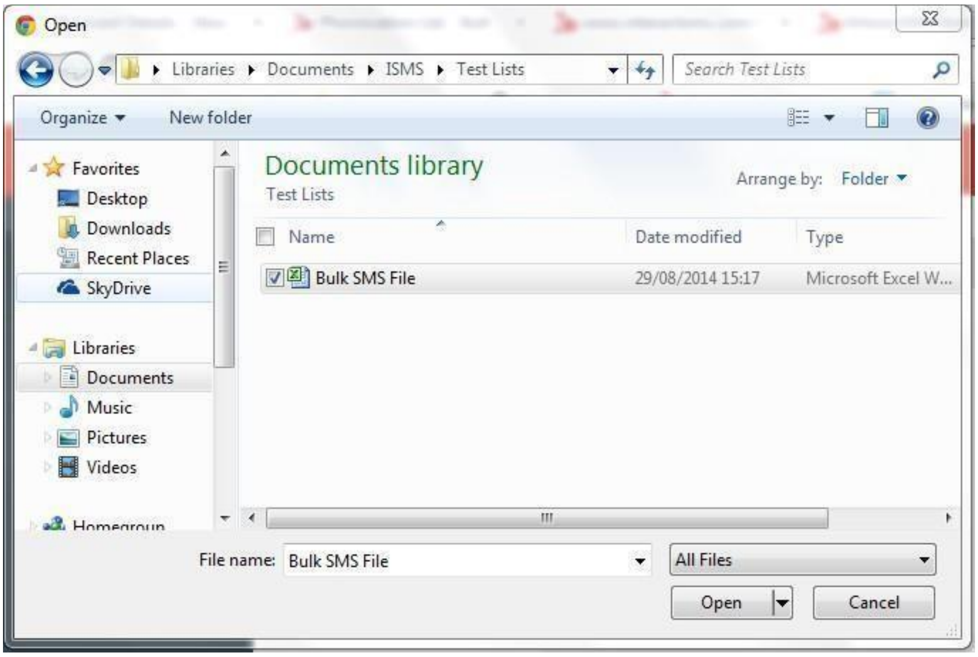
4. Make sure that there are no breaks or empty records (rows) in the file.

5. There should be no formulas in the Microsoft Excel© cells.

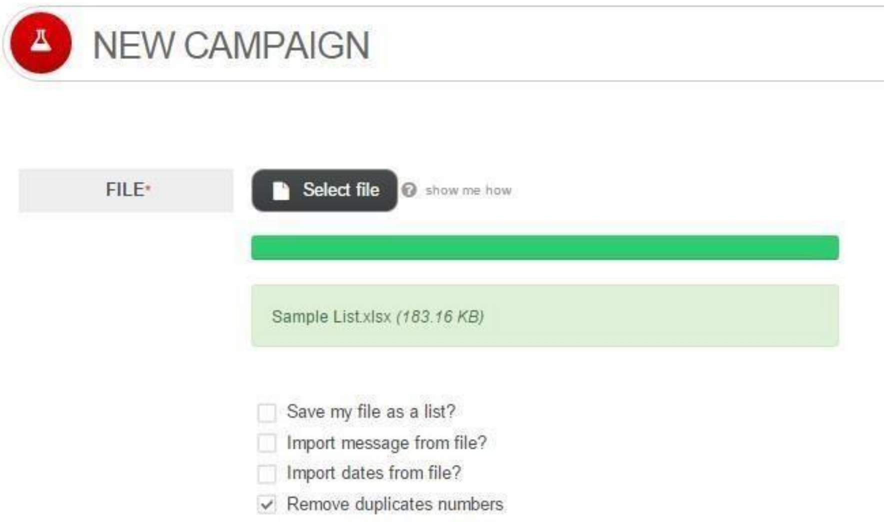
**Advanced files**

Advanced files may contain the message text to be sent to contacts in the second column (Column B). Please see section on **Use messages from spreadsheet** below. Advanced lists may also contain the scheduled dates and times to send messages in the third column (Column C). Please see section on **Use scheduled dates and times from spreadsheet** below.

Once you have formatted the file correctly, you can then browse to where your file is located by clicking the **Select file** button. The File upload window is displayed. Navigate to the correct file path location and select **Open**. *This demonstration is using Microsoft Windows operating system; the file selection method will vary for different operating systems.*




If the file is a Microsoft Excel© file, the list will be uploaded and will be displayed as below.




#### 6.1.1.2 Save my file as a list for future use

This option can be selected to save the Microsoft Excel© file for future use as a saved list. Once this option is selected you will be prompted to enter a **List name**. This is just for your own use when accessing the list.

This list can be accessed and updated at a later date through the **Lists** menu. Lists can also be selected through the **Send to a saved list** menu in **Campaign set up**. Please see the section on **Lists** for more information on managing lists.

### 6.1.1.3 Use messages from spreadsheet

This option can be selected to send an SMS campaign using the messages contained in a Microsoft Excel© file. Messages must be contained in the second column (**Column B**). This is useful when sending a campaign with different messages to different contacts. If you are sending all messages with the same SMS, you may find it easier to omit the messages in your Excel© file. Then, instead enter the Message text into the Message text field in **Step 3. Message text**

| | A | B | C |
|---|---|---|---|
| 1 | 353850000001 | Hi Samantha, have you seen the latest release? | |
| 2 | 353850000002 | Hi Maura, the project is going really well. | |
| 3 | 353850000003 | Hi Andrew, can you make it in today? | |
| 4 | 447700000004 | Hi Paul, how close is your work to completion? | |
| 5 | 447700000005 | Hi there Aishling, we'll have that file to you by Friday. | |
| 6 | | | |

Please see the **Message text** section to see how messages should be formatted and the size limits.

### 6.1.1.4 Use scheduled dates and times from spreadsheet

This option is used when sending an SMS campaign at the times and dates contained in a Microsoft Excel© file. Dates and times must be contained in the third column (**Column C**). This is useful when sending a campaign to contacts at different times. If sending all messages at the same date and time, you may find it easier to leave out the dates and times in your Excel© file. Then, instead, schedule the campaign in **Step 4. Send time**

Dates and times (**Column C**) must be formatted as shown below: **dd/mm/yyyy hh:mm**.

| | A | B | C | D |
|---|---|---|---|---|
| 1 | 353850000001 | | 01/02/2015 17:00 | |
| 2 | 353850000002 | | 02/02/2015 17:30 | |
| 3 | 353850000003 | | 12/02/2015 10:00 | |
| 4 | 447700000004 | | 12/02/2015 13:00 | |
| 5 | 447700000005 | | 15/02/2015 14:30 | |
| 6 | | | | |

For instructions on how to format dates and times, please see the section on **Formatting the future date and time column (Column C).**

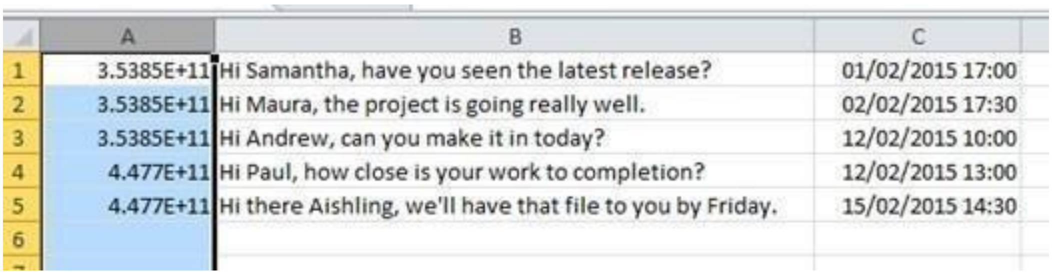
### 6.1.1.5 Formatting the number column (Column A)

Depending on the version of Microsoft Excel© installed on the user's PC, there may be a need to format the number column so that it will be processed correctly.

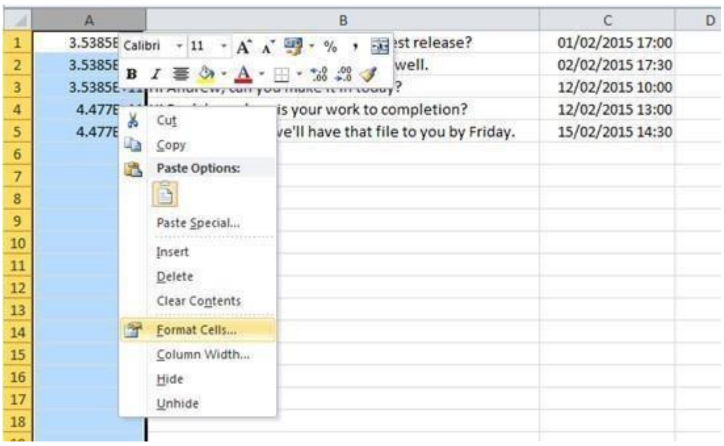
**Note:** The instructions below may vary depending on the version of Microsoft Excel©

To format the numbers, clients will need to carry out the following:

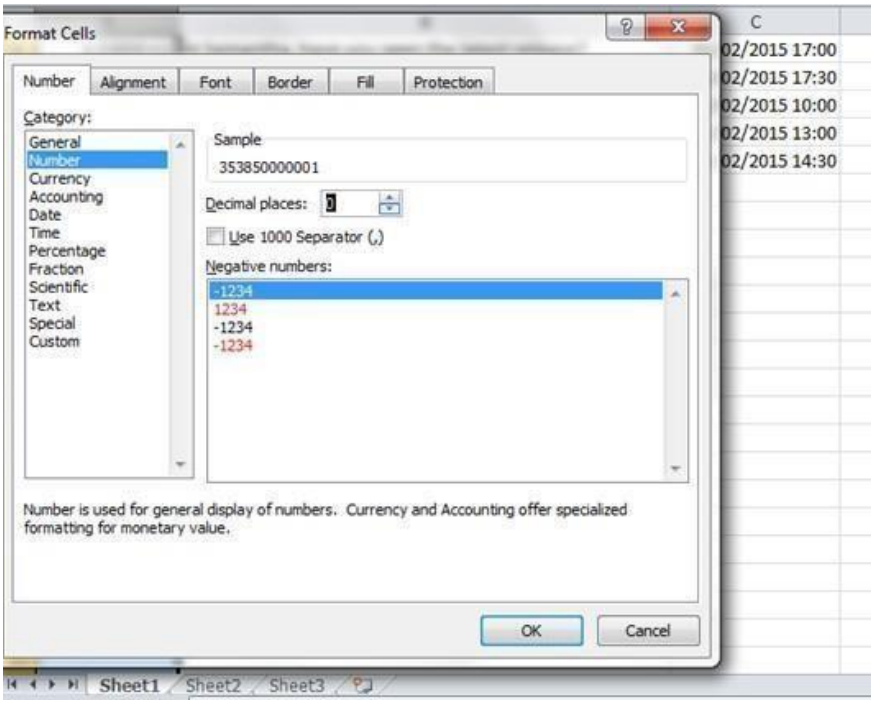
- Select all of the numbers in the first column (**Column A**) by clicking above the top cell. There should only be numbers present in the first column.



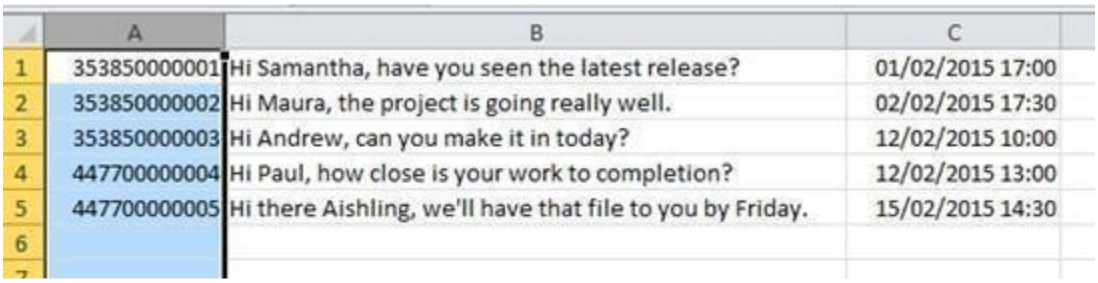

- Right click on the selected items and select **Format Cells…** from the list. The **Format cells** popup box is displayed.




- Locate the **Number** tab on the **Format cells** popup box.
- Select **Number** from the **Category** list.
- Set the number of decimal places to **Zero**.
- Select **OK** to save the changes to the selected items.




- The number column (**Column A**) should now be configured with the correct formatting.



| | A | B | C |
|---|---|---|---|
| 1 | 353850000001 | Hi Samantha, have you seen the latest release? | 01/02/2015 17:00 |
| 2 | 353850000002 | Hi Maura, the project is going really well. | 02/02/2015 17:30 |
| 3 | 353850000003 | Hi Andrew, can you make it in today? | 12/02/2015 10:00 |
| 4 | 447700000004 | Hi Paul, how close is your work to completion? | 12/02/2015 13:00 |
| 5 | 447700000005 | Hi there Aishling, we'll have that file to you by Friday. | 15/02/2015 14:30 |
| 6 | | | |

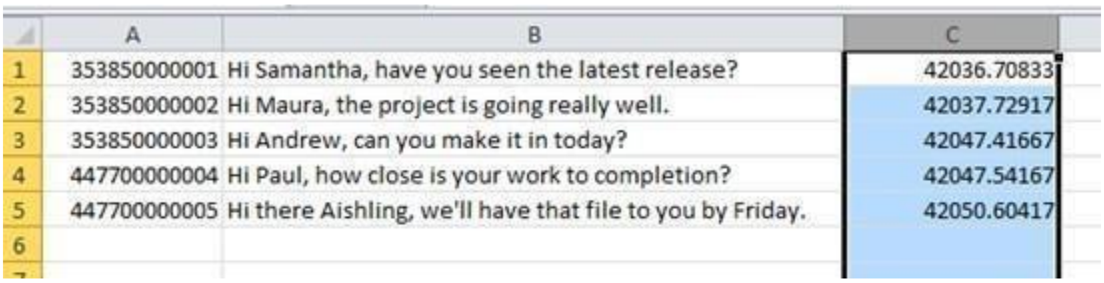
### 6.1.1.6 Formatting the future date and time column (Column C)

Depending on the version of Microsoft Excel© installed on the client's PC, there may also be a need to format the date and time column (Column C) so that messages will be sent to future dates and times correctly.

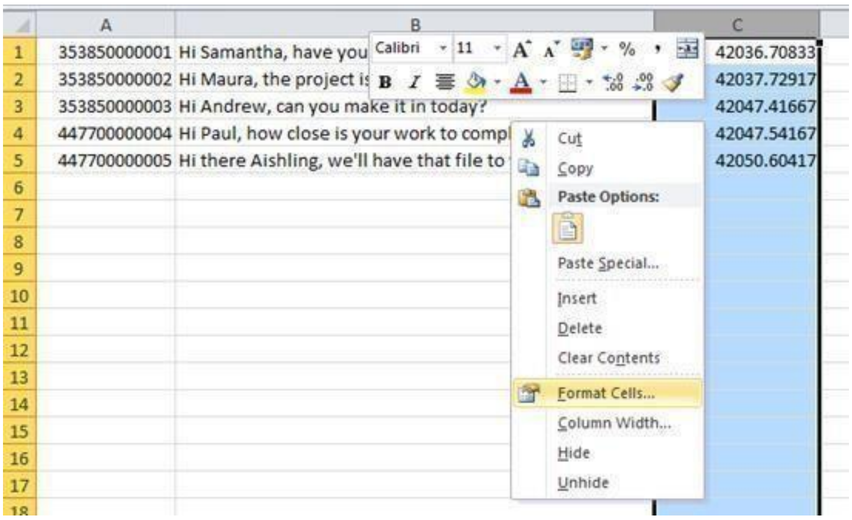
| | |
|---|---|
| **Note:** | The instructions below may vary depending on the version of Microsoft Excel© |

To format the date and time column, clients will need to carry out the following:

- Select all the dates in the third column (**Column C**). There should only be future dates and times present in this column.



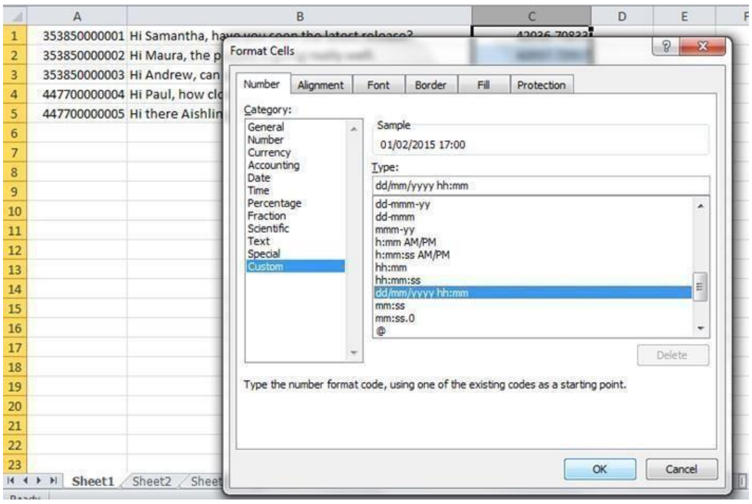

- Right click on the selected items and select the **Format cells…** option from the list. The **Format cells** popup box is displayed.



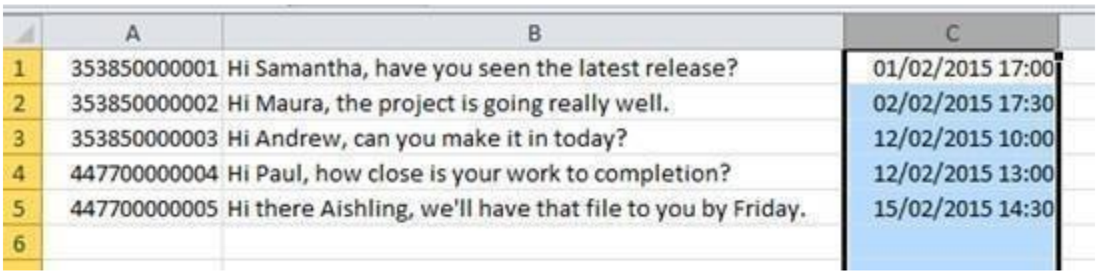

- Locate the **Number** tab on the **Format cells** popup box.

- Select **Custom** from the **Category** list.

- Select the format option **dd/mm/yyyy hh:mm** from the sample formatting options available.



- Select **OK** to save the changes to the selected items.



| | A | B | C |
|---|---|---|---|
| 1 | 353850000001 | Hi Samantha, have you seen the latest release? | 01/02/2015 17:00 |
| 2 | 353850000002 | Hi Maura, the project is going really well. | 02/02/2015 17:30 |
| 3 | 353850000003 | Hi Andrew, can you make it in today? | 12/02/2015 10:00 |
| 4 | 447700000004 | Hi Paul, how close is your work to completion? | 12/02/2015 13:00 |
| 5 | 447700000005 | Hi there Aishling, we'll have that file to you by Friday. | 15/02/2015 14:30 |
| 6 | | | |

#### 6.1.1.7 Remove duplicates

This option automatically removes any duplicate contacts whose mobile numbers are listed more than once in Column A of a Microsoft Excel© file.

If you have selected to use the message text from the file and you have two different SMS messages for the same mobile number, it will not count as a duplicate and the contact will receive both messages.

### *6.1.2 Step 2. Sender name*

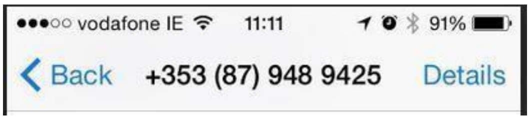
You will be required to enter the following information relating to whom the campaign will be broadcast from:

#### 6.1.2.1 Campaign name

This is a name given to the message campaign; it is only used for reference. This will not be sent as a part of the message. Campaign names are used to easily identify broadcasts that have been sent by the user. For Example, 'May Discount Campaign'.


#### 6.1.2.2 Allow recipients to reply to this message

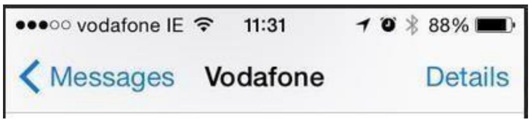
This option allows recipients of a campaign to reply to SMS messages. If you select this, the sender name (who the recipient will see as having sent the message) will be the shared long code 353870602263.




Replies can be viewed in the **Replies report**.

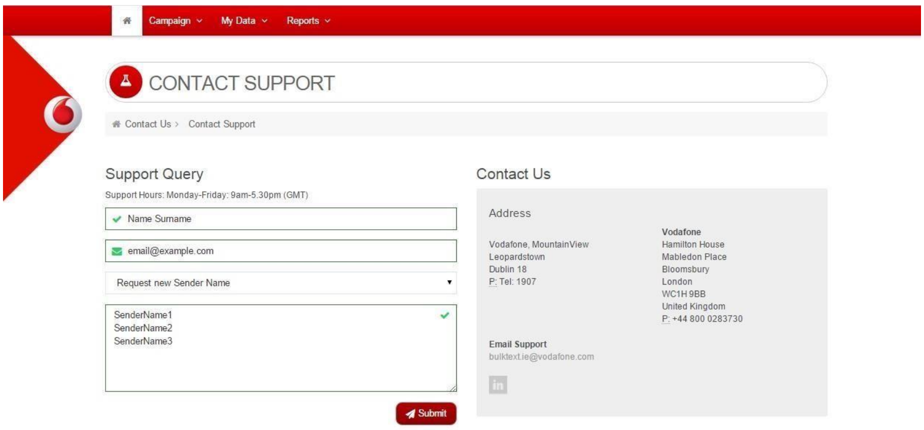
#### 6.1.2.3 Sender Name

This is the name that will appear at the top of the recipient's handset. This is useful as the sender name is easily identifiable when received by the recipient. The default sender name is set to **FreeText**. A new Sender name can be created and allocated upon request. Please see the next section **Set up your own sender name**. An example of a sender name might be 'Vodafone'. When this lands on a recipient's handset they can easily identify that Vodafone Bulk Text has sent them a message.


#### 6.1.2.4 Set up your own sender name

Select **Set up your own sender name** under the **Sender name** field to display the **Contact Support** page, with 'Request new Sender Name' preselected as the support query topic. Enter your name in the field provided. Enter you email address in the field provided. Enter the sender name (or sender names) that you would like to request in the field provided.




All sender names must be screened manually before they can be used. Vodafone Bulk Text endeavour to respond to all sender name requests, as soon as possible.

Sender names must not:

- Exceed 11 characters
- Contain characters that are not numbers or letters. For example, -,@,?.
- Contain spaces
- Conflict with any existing sender name

When a sender name has been screened the user will be contacted by email, regardless of whether the sender name has been set up or not. If the sender name has been set up it will be displayed in the **Sender name** field.

Sender names can also be viewed in **Account details.** Please see section on **Account details**.

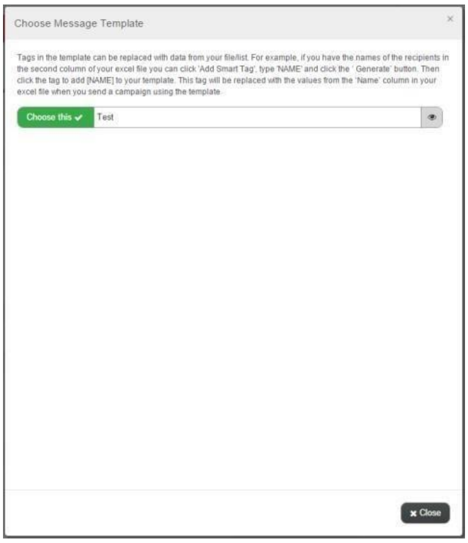
### 6.1.3 Step 3. Message text

Step 3 deals with the actual message that is to be sent to the recipient.

#### 6.1.3.1 Choose from templates

If a SMS message body has been saved as a template it can be selected here and will populate the **Message Text** field. This template can then be edited before sending. Templates are used when sending predefined SMS messages, such as for notifications or alerts, where the wording may need to be specific or repeated quite often.

Click the **Choose from templates button** above the Message text box to display the popup. This will show all the available saved templates. Hover the mouse over each template to see if it is available for this campaign.



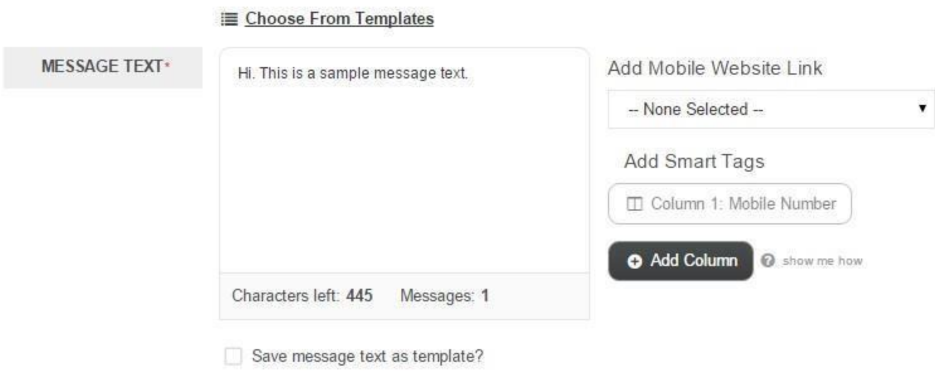

A green **Choose this** ✓ will appear on the left hand side of the template, if it is available. A red **Not available x** will appear on the left hand side of the template, if it is not available. Templates would be unavailable for a campaign, if it contains smart tags but no smart tags have been created for this message. Please see section on **[Smart tags – for a new file]**.


To preview a full message template, click the eye symbol ( ) to the right of that template. The below popup will then display the entire template.


Click the **Choose** button to populate the **Message Text** field with this template.

#### 6.1.3.1 Message text

The Message text field will contain the body or content of the message that will be sent to all the contacts in the campaign.




### 6.1.3.2 Message Length and Special Characters

A standard SMS message length is made up of 160 characters. Longer messages require multiple messages to be grouped together and sent as 2 to 3 messages, using 2 to 3 Credits depending on the message size. For example, a 1-160 character message uses 1 credit, a message using 161-320 characters uses 2 credits, and a message using 321-480 characters uses 3 credits.

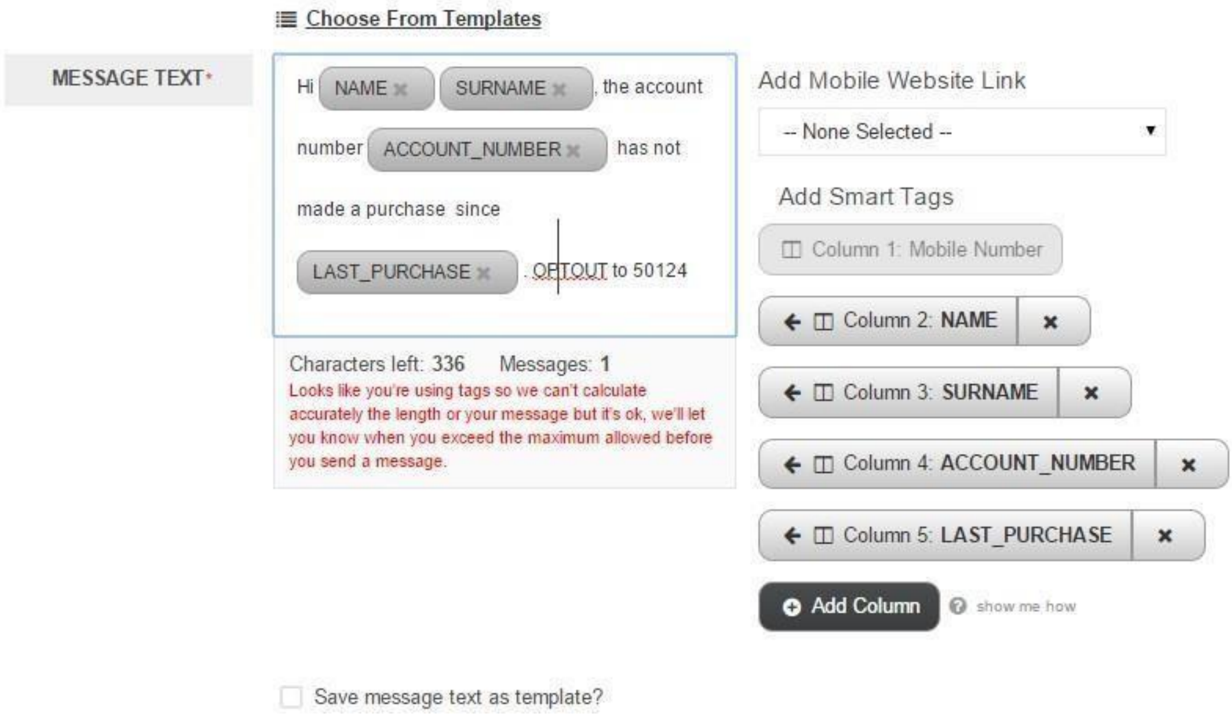
These values are correct for English plain SMS characters. Special characters (for example, €, £, $) may use more than one character space.

### 6.1.3.1 Smart tags – for a new file

Smart tags are a feature that allow you to automatically populate your messages with values from your Excel© file.

| | |
|---|---|
| **Support video available:** | Show me how to use smart tags |

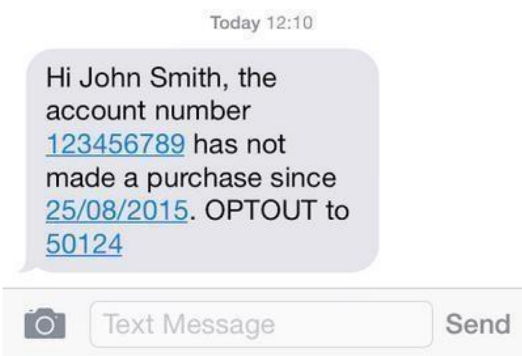
An example of a message with smart tags is below.




The grey squares filled with text (e.g. ) are **smart tags**. They are entered into the Message text by clicking on the smart tag you want, on the right of the **Message text** field, e.g. .

The column numbers for each smart tag correspond to the column number from your uploaded Excel© file. The values from each contact on your file are then pulled into the message, when the campaign is sent; thereby sending personalised messages to all the contacts in your file, based on the information regarding them, contained in the file.

The above example would be delivered as displayed below:




To create smart tags for a new file you are required to do the following:

- Format you Microsoft Excel© file with relevant information in the columns after column A. Column A must always contain the mobile numbers.

| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | 353850000001 | Nigel | Smith | 15/07/2015 | 12:00 | |
| 2 | 353850000002 | John | Jones | 16/07/2015 | 13:00 | |
| 3 | 353850000003 | Sarah | Hughes | 17/07/2015 | 14:00 | |
| 4 | 447700000004 | Mark | Roberts | 18/07/2015 | 15:00 | |
| 5 | 447700000005 | Jane | Maguire | 19/07/2015 | 16:00 | |
| 6 | | | | | | |

- Upload the file, please see section on **Select Excel© file**.

- Scroll to the **Message text** field in **Step 3**. There will be no smart tags displayed yet.

- Click the **Add column** button to display the below popup.


- Type the name you want to give your smart tag into the **Column name** field. **NAME** in this example. The actual name is only for your own reference and will not affect what information is pulled from your file. The smart tag will be assigned to column 2 (B) as it is the first column after the mobile phone number column. Click the **Add column** button.

- The smart tag will now appear on the right of the Message text field.

- You can enter as many smart tags as you have columns in your file, by repeating the previous steps.

- Click on the smart tags on the right to add them to your Message text.

When you send this campaign now it will assign the name and surname of each individual contact to their message. This is assuming you have the correct names in Column 2 (B) and the correct surnames in column 3 (C).

#### 6.1.3.1 Save Message text as a template?

Underneath the **Message text** field there is an option to save the message as a template. Saving a message as a template allows you to reuse commonly used SMS message content. Please see section on **Templates** for more information on managing templates.

### *6.1.4 Step 4. Send time*

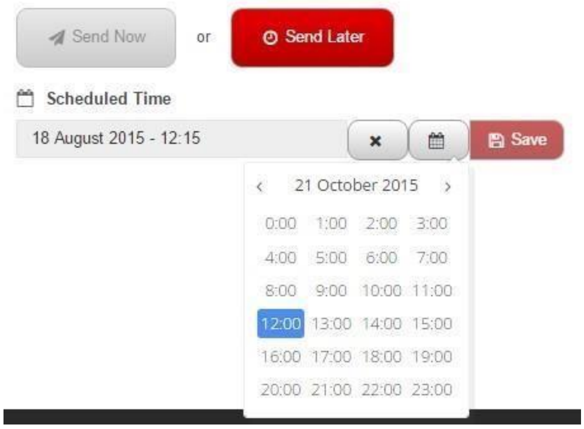

There are two options that can be selected in Step 4, **Send Now** or **Send Later**.

#### 6.1.4.1 Send Now

To send the message campaign at the current time and date, click the **Send Now** button. **If the option to use dates from the Microsoft Excel© file is selected, then the campaign will be sent at the dates and times listed.** If there are no dates in the Microsoft Excel© document, the messages will begin to send straight away.

#### 6.1.4.2 Send Later

Select this option if you would like all of the messages to be broadcast at a later date and time.




Options to enter a future date and time will be displayed. You will be required to select the date and time for the message campaign from these options. The messages will then be stored by the V odafone Bulk Text application to be sent at the specified future date and time.

**Note:** A message campaign that has been scheduled to be sent at a later date may be cancelled up until the selected send later date and time. Once messages in a campaign have begun to send, the broadcast cannot be cancelled.

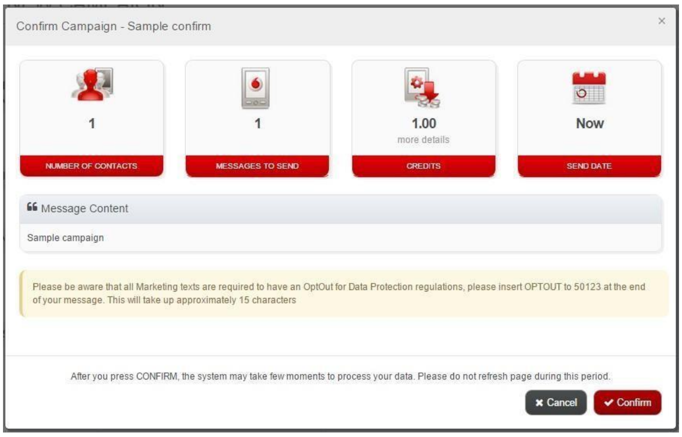
#### 6.1.3.1 Confirm Campaign (Small Campaigns)

After you have selected either **Send now** or **Send later** with a campaign to a small number of contacts, if you have also selected the **Show summary?** option, a popup box will appear that will ask you to confirm your campaign details before sending.

This will display the **Number of contacts; Messages to send; Credits; Send date** and **Message content.**

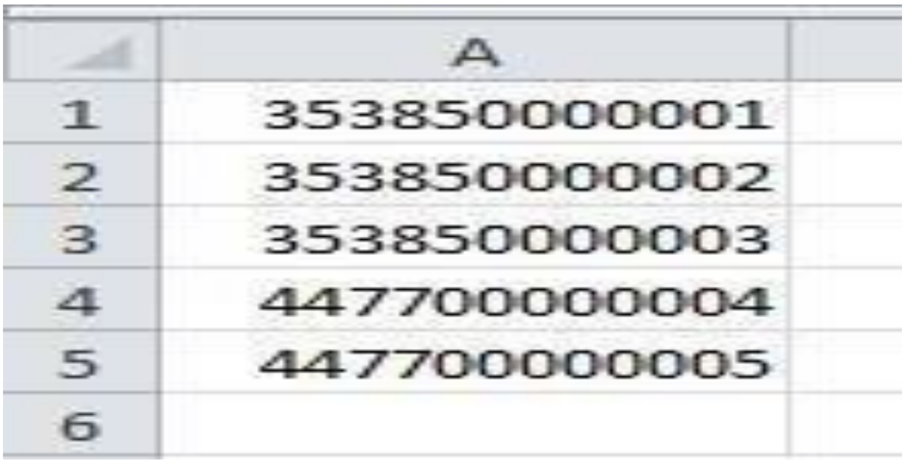
**Number of contacts** is how many recipients will receive an SMS in the campaign.

**Messages to send** is the number of total messages to be sent out and is what will be charged for. If, for example, a Message text goes over 160 characters, the number of **messages to be sent** will double as the contact will receive two messages.




If you select **Cancel**, the campaign will not be sent. You will be returned to the **Send campaign** page to amend or update details.

If the details are correct, click **Confirm** to continue. You will then be redirected to the dashboard, where the results of your message campaign can be viewed.



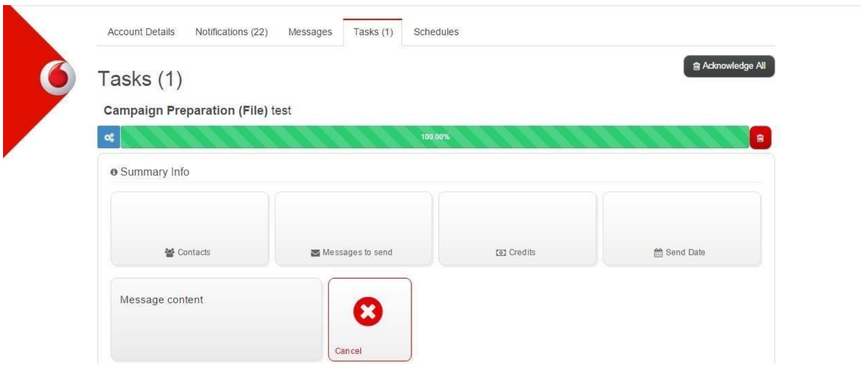
| | A |
|---|---|
| 1 | 353850000001 |
| 2 | 353850000002 |
| 3 | 353850000003 |
| 4 | 447700000004 |
| 5 | 447700000005 |
| 6 | |

#### 6.1.3.2 Confirm Campaign (Large Campaigns)

Campaigns to a large number of contacts take a little longer to process. When you send a large campaign you will be taken to the tasks page where you can view the processing of the broadcast. For more information, see the section on **Tasks**.

If the **Show summary?** box is checked then the below task will appear. The bar will load as the broadcast is processing. Once the preparation bar has reached 100% the broadcast has still not been sent. View all the broadcast information and if you are happy with it, click the green **Confirm** button to send.

If you do not want to send the campaign, click the red **Cancel** button.

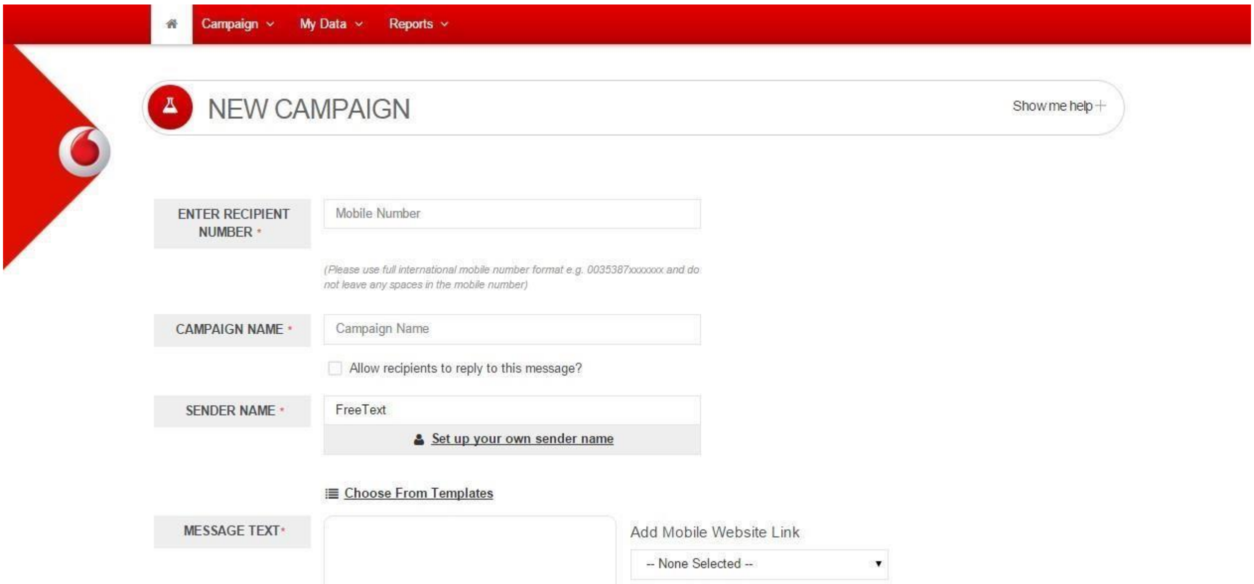



If the **Show summary?** box is not checked then the below bar will appear. Once the broadcast has finished processing you will not be asked for confirmation, it will send automatically.

## 6.2 Send to one mobile number

This option is used to send a campaign to only one mobile number or recipient.

To send a message campaign to one number, select **Send to one mobile number** from the **Campaign** menu on the top menu bar, the **Send to one mobile number** page is displayed below.




You will be required to follow the 4 steps on the **Send to one mobile number** screen to send a message campaign:

- Step 1. Campaign recipients
- Step 2. Sender name
- Step 3. Message text
- Step 4. Send time

These steps will be explained in more detail in the following sections.

### *6.2.1 Campaign recipients*

Here you are required to enter the mobile number of the contact to whom you would like to send an SMS. Enter the number into the **Enter recipient number** field.

Mobile numbers must be formatted in the following way.

1. The number should be formatted with the full international code, e.g. 00353850000001 or 353850000001.

2. Make sure to remove all special characters and spaces. For example ( ) - + ' ~.

### 6.1.3 Step 2. Sender name

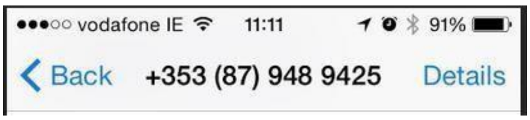
You will be required to enter the following information relating to whom the campaign will be broadcast from:

#### 6.1.3.1 Campaign name

This is a name given to the message campaign; it is only used for reference. This will not be sent as a part of the message. Campaign names are used to easily identify broadcasts that have been sent by the user. For Example, 'May Discount Campaign'.


#### 6.1.3.2 Allow recipients to reply to this message

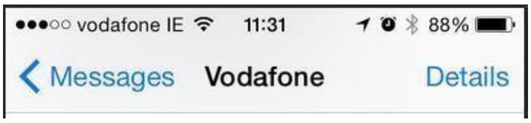
This option allows recipients of a campaign to reply to SMS messages. If you select this, the sender name (who the recipient will see as having sent the message) will be the shared long code 353870602263.


Replies can be viewed in the **Replies report**.

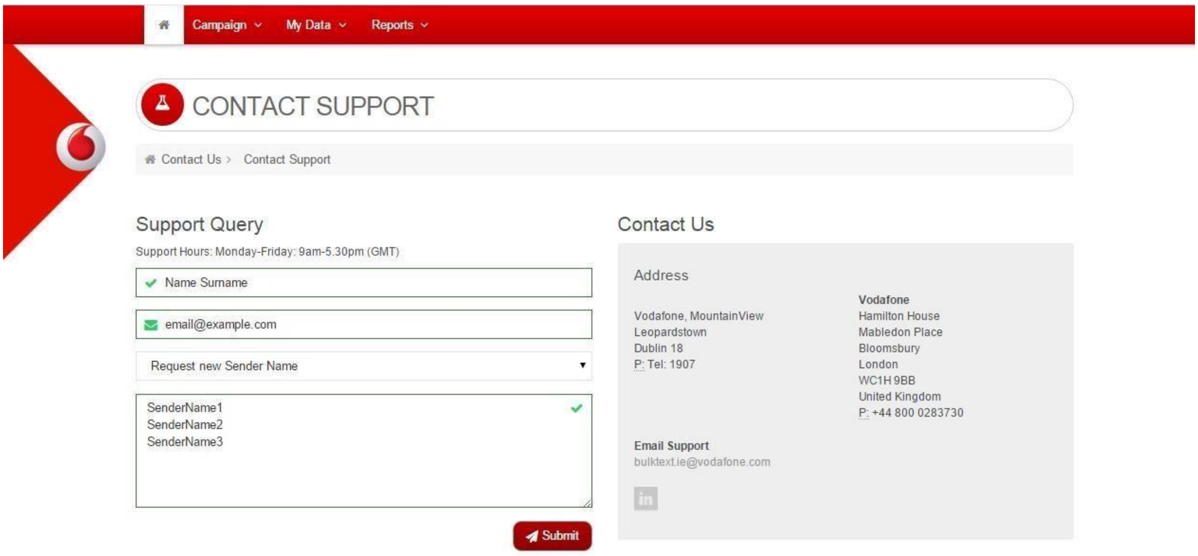
#### 6.1.3.3 Sender Name

This is the name that will appear at the top of the recipient's handset. This is useful as the sender name is easily identifiable when received by the recipient. The default sender name is set to **FreeText**. A new Sender name can be created and allocated upon request. Please see the next section **Set up your own sender name**. An example of a sender name might be 'Vodafone'. When this lands on a recipient's handset they can easily identify that Vodafone Bulk Text has sent them a message.




#### 6.1.3.4 Set up your own sender name

Select **Set up your own sender name** under the **Sender name** field to display the **Contact Support** page, with 'Request new Sender Name' preselected as the support query topic. Enter your name in the field provided. Enter you email address in the field provided. Enter the sender name (or sender names) that you would like to request in the field provided.




All sender names must be screened manually before they can be used. Vodafone Bulk Text endeavour to respond to all sender name requests, as soon as possible.

Sender names must not:

- Exceed 11 characters
- Contain characters that are not numbers or letters. For example, -,@,?.
- Contain spaces
- Conflict with any existing sender name

When a sender name has been screened the user will be contacted by email, regardless of whether the sender name has been set up or not. If the sender name has been set up it will be displayed in the **Sender name** field.

Sender names can also be viewed in **Account details.** Please see section on **Account details**.

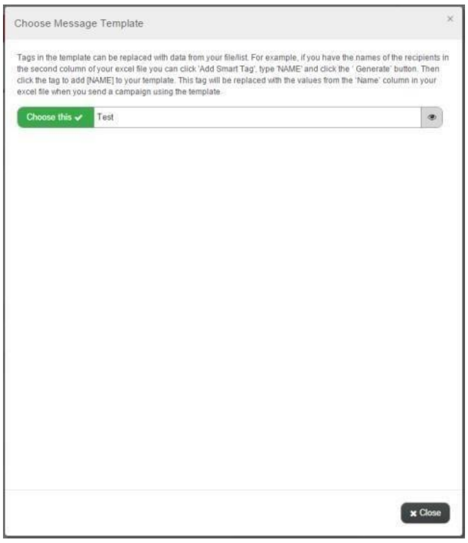
### 6.2.3 Step 3. Message text

Step 3 deals with the actual message that is to be sent to the recipient.


#### 6.1.3.2 Choose from templates

If a SMS message body has been saved as a template it can be selected here and will populate the **Message Text** field. This template can then be edited before sending. Templates are used when sending predefined SMS messages, such as for notifications or alerts, where the wording may need to be specific or repeated quite often.

Click the **Choose from templates button** above the Message text box to display the popup. This will show all the available saved templates. Hover the mouse over each template to see if it is available for this campaign.




A green **Choose this** ✓ will appear on the left hand side of the template, if it is available. A red **Not available x** will appear on the left hand side of the template, if it is not available. Templates would be unavailable for a campaign, if it contains smart tags as there are no smart tags when sending to one number.


To preview a full message template, click the eye symbol ( ) to the right of that template. The below popup will then display the entire template.


Click the **Choose** button to populate the **Message Text** field with this template.

#### 6.1.3.3 Message text

The Message text field will contain the body or content of the message that will be sent to all the contacts in the campaign.

#### 6.1.3.4 Message Length and Special Characters

A standard SMS message length is made up of 160 characters. Longer messages require multiple messages to be grouped together and sent as 2 to 3 messages, using 2 to 3 Credits depending on the message size. For example, a 1-160 character message uses 1 credit, a message using 161-320 characters uses 2 credits, and a message using 321-480 characters uses 3 credits.

These values are correct for English plain SMS characters. Special characters (for example, €, £, $) may use more than one character space.

#### 6.1.4.3 Save Message text as a template?

Underneath the **Message text** field there is an option to save the message as a template. Saving a message as a template allows you to reuse commonly used SMS message content. Please see section on **Templates** for more information on managing templates.

### *6.1.5 Step 4. Send time*

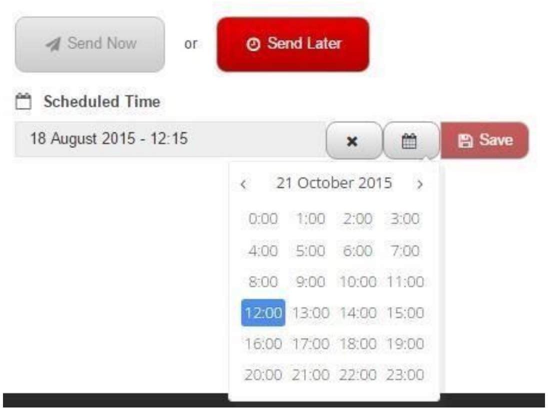

There are two options that can be selected in Step 4, **Send Now** or **Send Later**.

#### 6.1.5.1 Send Now

To send the message campaign at the current time and date, click the **Send Now** button.

#### 6.1.5.2 Send Later

Select this option if you would like all of the message to be broadcast at a later date and time.




Options to enter a future date and time will be displayed. You will be required to select the date and time for the message campaign from these options. The messages will then be stored by the V odafone Bulk Text application to be sent at the specified future date and time.

**Note:** A message campaign that has been scheduled to be sent at a later date may be cancelled up until the selected send later date and time. Once messages in a campaign have begun to send, the broadcast cannot be cancelled.

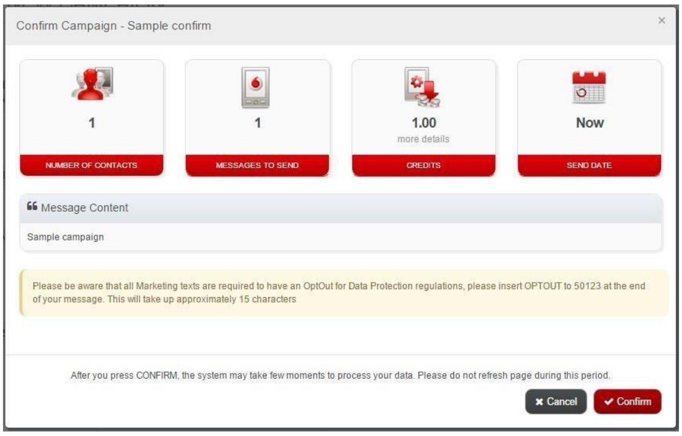
#### 6.1.3.3 Confirm Campaign

After you have selected either **Send now** or **Send later** a popup box will appear that will ask you to confirm your campaign details before sending.

This will display the **Number of contacts; Messages to send; Credits; Send date** and **Message content.**

**Number of contacts** is how many recipients will receive an SMS in the campaign.

**Messages to send** is the number of total messages to be sent out and is what will be charged for. If, for example, a Message text goes over 160 characters, the number of **messages to be sent** will double as the contact will receive two messages.




If you select **Cancel**, the campaign will not be sent. You will be returned to the **Send campaign** page to amend or update details.

If the details are correct, click **Confirm** to continue. You will then be redirected to the dashboard, where the results of your message campaign can be viewed.

| | A | |
|---|---|---|
| 1 | 353850000001 | |
| 2 | 353850000002 | |
| 3 | 353850000003 | |
| 4 | 447700000004 | |
| 5 | 447700000005 | |
| 6 | | |

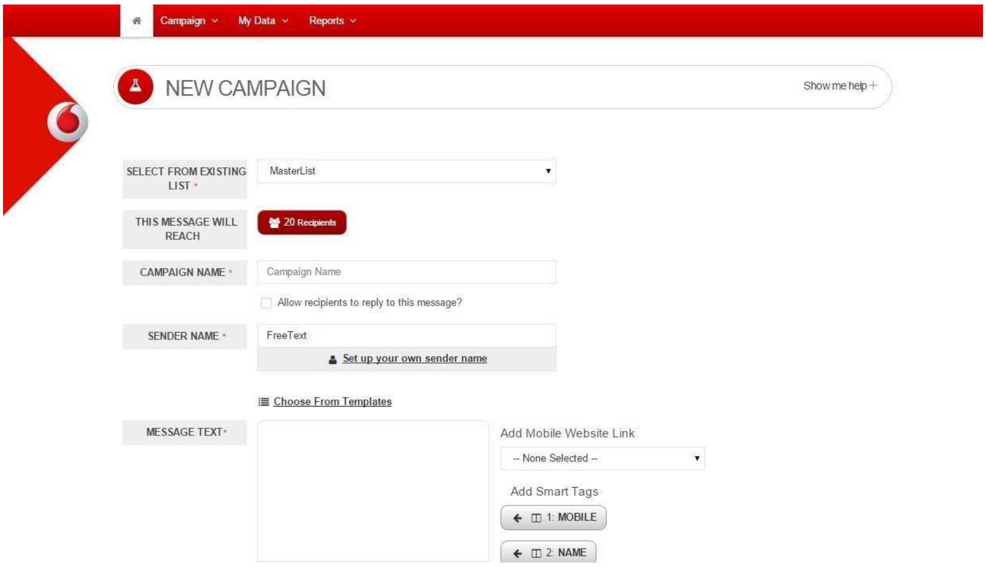
## 6.3 Send to a saved list

This option is used when you want to send a campaign to a previously saved list of contacts in the Vodafone Bulk Text application. Lists can contain all customer information from a CRM. Lists can also be created and edited in the **Lists** page on the top menu bar. Please see the section on **Lists**.

Basic lists will contain only the mobile numbers of contacts. Advanced lists can contain any relevant information relating to your contacts. Unlike sending to a new file, sending to a saved list can use **Filters** to send to a segment of a saved list. Please see the section on [Filters](#).

Sending to a saved list also has the advantage over sending to new files of being able to schedule broadcasts at regular intervals automatically.

To send to a saved List, select **Send to a saved list** from the **Campaign** menu on the top menu bar. The **Send to a saved list** page is displayed below.




Users will be required to follow the 4 steps on the **Send to a saved list** screen to send their message campaign:

- Step 1. Campaign recipients
- Step 2. Sender name
- Step 3. Message text
- Step 4. Send time

These steps will be explained in more detail in the following sections.

### 6.3.1 Campaign recipients

You will be required to enter the following information relating to whom the campaign will be broadcast to:

#### 6.3.1.1 Select from existing list

You can select the list from the **Select from existing list** dropdown box. Lists can be created by uploading Microsoft Excel© spreadsheets (xls. or xlsx.) or Sms documents (.txt) in the correct format. Lists can also be created by saving a Microsoft Excel© spreadsheet when sending a campaign to a new file, please see section on **Send to a new file**. For more information on managing lists, please see the section on **Lists**.


### 6.3.1.2 This message will reach

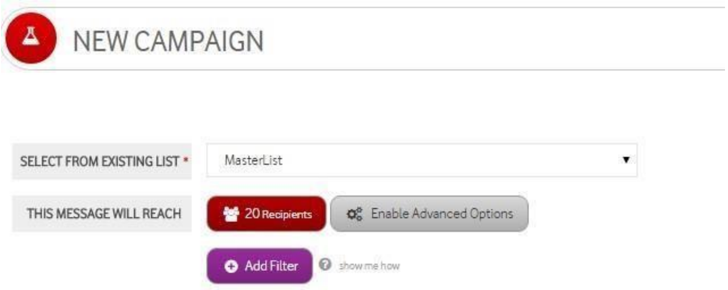
This allows you to see how many recipients will receive messages from your campaign. Once you have selected a list from the dropdown box, the number of contacts in your list will be displayed here. If you add any filters to segment your group this number will be the number of recipients in the segment that you are sending to. Please see the section on **Filters** below.


| | |
|---|---|
| **Note:** | Sending to a saved list will automatically remove duplicate mobile numbers from campaigns. |

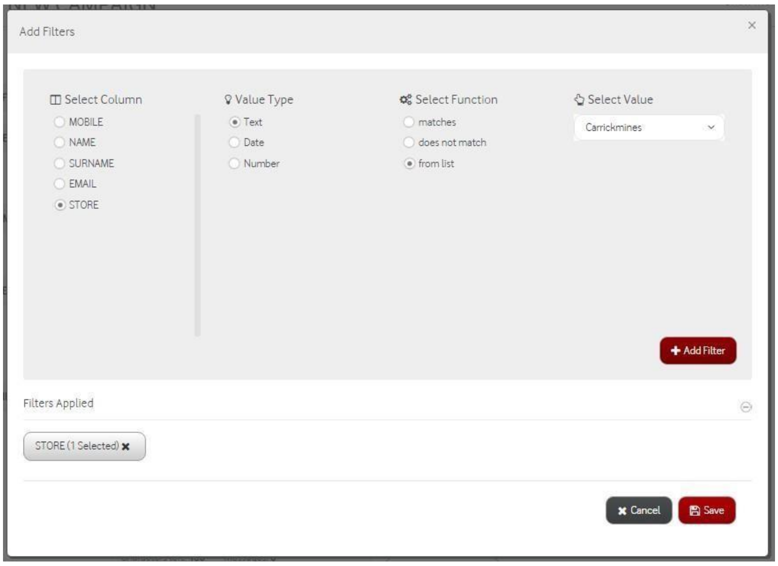
### 6.3.1.3 Filters

Filters allow you to send campaigns to specific segments of a saved list. The segment can be based on any criteria contained within the list.

Click **Add Filter** to display the below popup. The Add Filter button will not display if you have no saved lists or the list you have selected has only mobile numbers.




Filters are added using four steps: **Select Column, Value Type, Select Function** and **Enter Value.**




**Select Column**

First you must choose which information from your list you would like to segment by. Select the column from your list which you would like to base the segment on. The columns listed here are automatically pulled from the column names in your selected list.

For example, if you have a column in your list containing your contacts' dates of birth and you would like to send a campaign only to those in a certain age group, you would start by checking 'Date of birth', under **Select Column**.

**Value Type**

Select what type of information is contained in your selected column. Either **Text**, **Dates** or **Numbers**. The value type will affect how the information in the column segmented in the **Select Function** and **Select Value** sections.

**Select Function**

Here you select how you would like to segment the contacts, the options in this field will depend on the selection in the **Value Type** field.

The first two options are always **matches** or **does not match.** Select **matches** if you would like your segment to contain only contacts whose text, date or number (in the selected column) exactly matches the value that you enter into the **Select Value** field. Select **does not match** to segment contacts that do not contain the selected value in the chosen column

For **Text** values, the other function option is **from list**. By selecting this option you will be able to choose from the values contained in your selected column from a dropdown menu in the **Select Value** field.

For **Date** values, the other function options are **after**, **before** and **range**. These functions allow the segment to be only those with dates before, after or in between a certain range from the selected column.

For **Number** values, the function options are very similar to the Date value options, they are **greater than**, **less than** and **range**. These functions allow the segment to be only those with numbers greater than, less than or in between a certain range from the selected column.

**Enter Value**

Here you enter the specific value or values that you want to segment by.

For values that are not a date, in a range or from a list there will simply be a SMS box here for you to enter the value that you would like to segment you contacts by, based on the selections you have made in the **Select Column, Value Type** and **Select Function** fields.

For **Text** value types with **from list** selected as the function, a dropdown menu will be displayed.

The values from your selected column will be pulled into this dropdown menu. You can scroll through these values and select as many values as you would like to segment by. You can also enter SMS or a number into the SMS box to search for values. You can use the **Select All** button to select all values**.** Similarly you can use the **Deselect All** button to start selecting values again**.** When one value is selected it is displayed in the dropdown box, when multiple values are selected, the number that are selected and the total number of list contacts are displayed instead.

For **Date** values where the selected function is not a **range,** a **Select Value** field is displayed.

To select a specific date as a value, check the **Date** box and select the exact date by clicking the calendar button and choosing the date.
To select only those values that are a certain number of days old, check the **Days Old** box. Then enter into the field the exact number of days old you would like to segment by.

For **Date** or **Number** values select or enter the desired start Date or Number and end Value or

Number. Only contacts with values between these two values will be included in the segment.

**Adding / Removing Filters**

Once the relevant filter criteria has been selected, the information can be collected into a filter by selecting the **Add Filter** button. It will then appear at the bottom of the popup.

Multiple filters can be applied by following the exact same process.

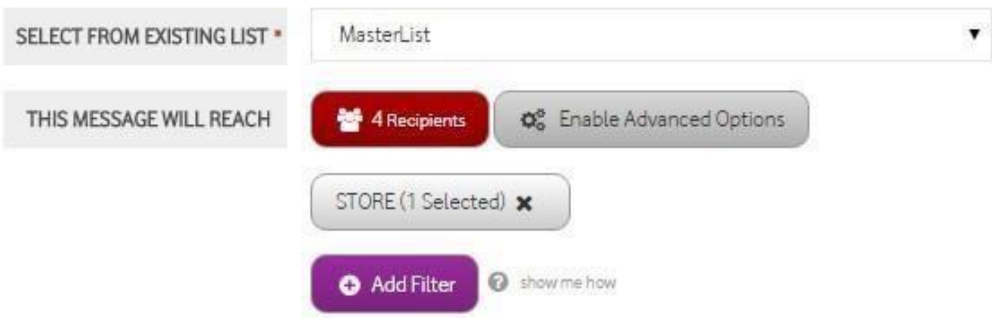
Filters can be removed by selecting the × beside the filter that you would like to delete. To leave the filters popup screen without using any filters, select the **Cancel** button.

**Saving Filters**

When you are happy with your filter(s), select the **Save** button to apply the filters to your list. You will now be returned to the **Campaign Set Up** page with the filter applied.

**Viewing Filter Recipients**

Your campaign will now be set to send to only those who are in this set of filters. You can see how many contacts are in this segment in the **This message will reach** display (just above the filters).

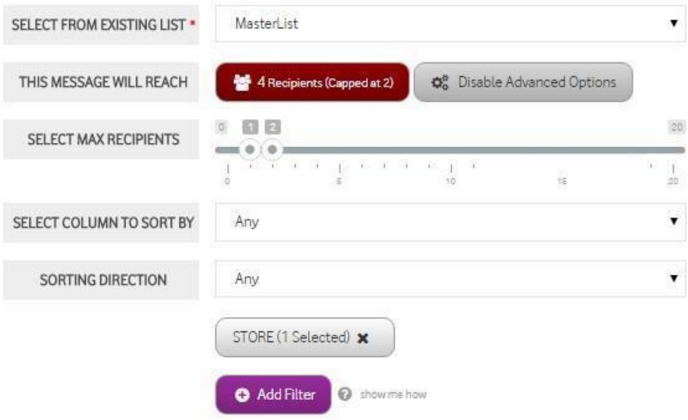



#### 6.3.1.1 Advanced Options

Advanced options are a feature that allows you to place a limit on the number of SMS sent in a campaign, based on criteria that you set. This option is only available when sending to a saved list. This option is especially useful when you want to cap the amount that you spend on a broadcast.

These limits can be applied to an entire list or a segment of the list if you have applied any **Filters**.

To enable advanced options, select **Send to a Saved List** in **Campaign Setup**. In **Step 1**, select the **Enable Advanced Options** button to the right of the **This message will reach** field.




You can set the maximum number of contacts that will receive messages in the **Select max recipients** bar. Simply move the cursor on the right of the bar down to the maximum number of contacts you want to send to. Do this by clicking it with the mouse and dragging it across. The number that this is capped at will be displayed in the **This message will reach field,** after the total number of recipients in the list or segment. In brackets will be displayed **(Capped at xxxx**) with the number being the maximum number of recipients that you have selected.

If the campaign was sent at this stage, for example to 200 recipients, the broadcast would be sent to the first 200 contacts that were uploaded. To view these, export the selected list; the contacts at the top of the list will be sent to first.

To alter the selection criteria for these contacts, use the **Select column to sort by** and **Sorting direction** fields.

**Select column to sort by** offers a dropdown menu filled with the column names from your chosen list. Select which column you would like to filter by from this list. For example, if you would like to filter by oldest or most recent contacts on your list, you would select the DATE field if there is one in your list.

**Sorting direction** lets you select whether to send to contacts with the lowest or highest values from your selected column. This dropdown menu offers **Ascending** or **Descending**. This has a different meaning depending on whether the columns' values are numbers, dates or SMS.

If the values are a **number,** then ascending will send to the contacts with the lowest numbers, descending will filter by the contacts with the highest numbers.

If the values are a **date** then ascending will send to the contacts with the oldest dates, descending will filter by the contacts with the most recent dates.

If the values are **text** then ascending will send to the contacts that come first in alphabetical order, descending will filter by the contacts in reverse alphabetical order.

The broadcast numbers are now capped based on your selected criteria. To disable this cap, select the **Disable Advanced Options** button (it is in place of the original **Enable Advanced Options** button).

### *6.1.4 Step 2. Sender name*

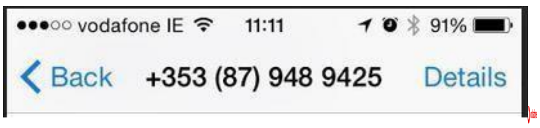
You will be required to enter the following information relating to whom the campaign will be broadcast from:

#### 6.1.4.1 Campaign name

This is a name given to the message campaign; it is only used for reference. This will not be sent as a part of the message. Campaign names are used to easily identify broadcasts that have been sent by the user. For Example, 'May Discount Campaign'.


#### 7.1.4.2 Allow recipients to reply to this message

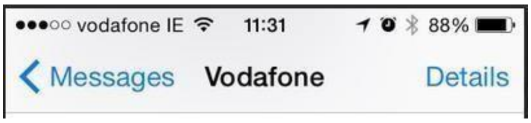
This option allows recipients of a campaign to reply to SMS messages. If you select this, the sender name (who the recipient will see as having sent the message) will be the shared long code 353870602263.

Replies can be viewed in the **Replies report**.

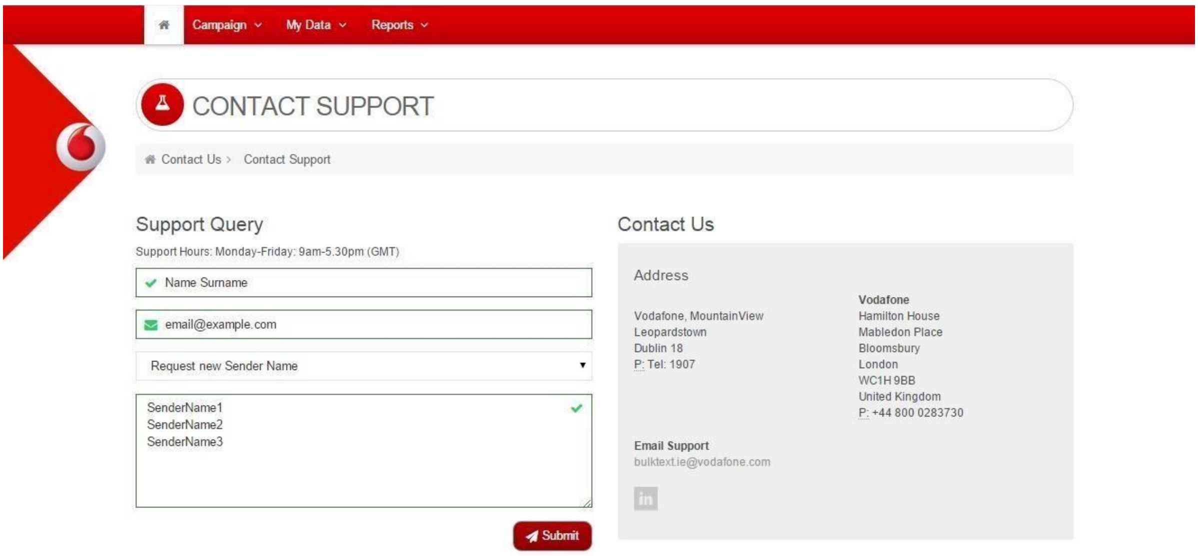
### 6.1.4.3 Sender Name

This is the name that will appear at the top of the recipient's handset. This is useful as the sender name is easily identifiable when received by the recipient. The default sender name is set to **FreeText**. A new Sender name can be created and allocated upon request. Please see the next section **Set up your own sender name**. An example of a sender name might be 'Vodafone'. When this lands on a recipient's handset they can easily identify that Vodafone Bulk Text has sent them a message.


### 6.1.4.4 Set up your own sender name

Select **Set up your own sender name** under the **Sender name** field to display the **Contact Support** page, with 'Request new Sender Name' preselected as the support query topic. Enter your name in the field provided. Enter you email address in the field provided. Enter the sender name (or sender names) that you would like to request in the field provided.




All sender names must be screened manually before they can be used. Vodafone Bulk Text endeavour to respond to all sender name requests, as soon as possible.

Sender names must not:

- Exceed 11 characters
- Contain characters that are not numbers or letters. For example, -,@,?.
- Contain spaces
- Conflict with any existing sender name

When a sender name has been screened the user will be contacted by email, regardless of whether the sender name has been set up or not. If the sender name has been set up it will be displayed in the **Sender name** field.

Sender names can also be viewed in **Account details.** Please see section on **Account details**.

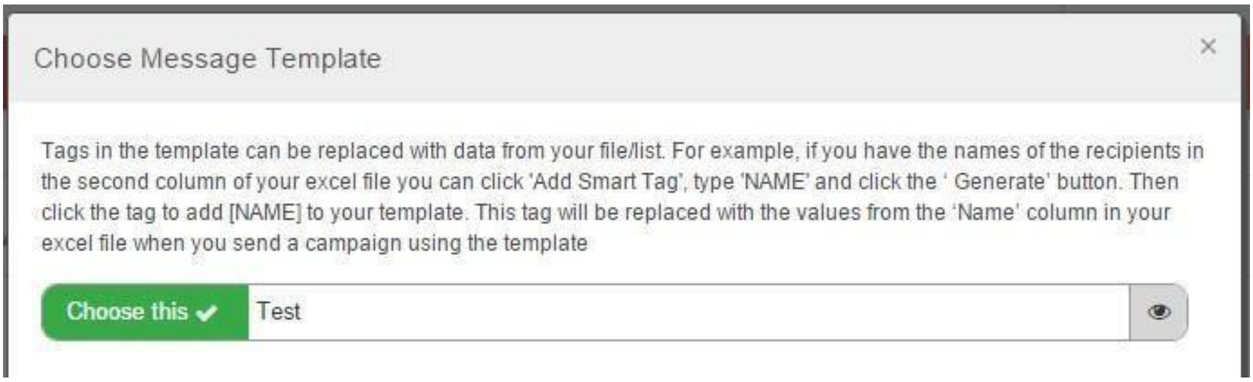
### *6.3.3 Step 3. Message text*

Step 3 deals with the actual message that is to be sent to the recipient.

#### 6.3.3.1 Choose from templates

If a SMS message body has been saved as a template it can be selected here and will populate the **Message text** field. This template can then be edited before sending. Templates are used when sending predefined SMS messages, such as, for notifications or alerts where the wording may need to be specific or repeated quite often.

Select **Choose from templates** above the **Message text** field to display the popup. This will show all the available saved templates. Hover the mouse over each template to see if it is available for this campaign.




A green **Choose this** ✓ will appear on the left hand side of the template, if it is available. A red **Not available x** will appear on the left hand side of the template, if it is not available. Templates would be unavailable for a campaign, if it contains Smart tags that do not match the saved list. Please see section on **Smart tags – for a saved list**.

To preview a full message template, click the eye symbol ( ) to the right of that template. The below popup will then display the entire template.


#### 6.3.3.2 Message text

The Message text field will contain the body or content of the message that will be sent in the campaign.

#### 6.3.3.3 Message Length and Special Characters

A standard SMS message length is made up of 160 characters. Longer messages require multiple messages to be grouped together and sent as 2 to 3 messages, using 2 to 3 credits depending on the message size. For example, a 1-160 character message uses 1 credit, a message using 161-320 characters uses 2 credits, and a message using 321-480 characters uses 3 credits. These values are correct for English plain SMS characters. Special characters (for example, €, £, $) may use more than one of the characters allowed.

#### 6.3.3.4 Smart tags – for a saved lists

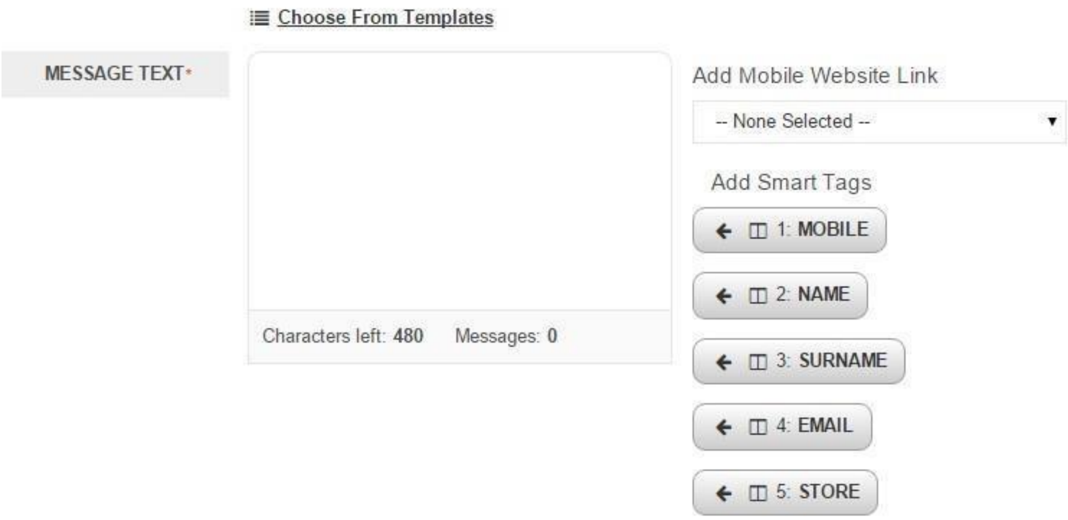
Smart tags are a feature that allows you to automatically populate your messages with values from your saved list.

Smart tags for a saved list have the exact same effect as smart tags for a new file. Please see section on **Smart tags – for a new file**, for a full explanation of smart tags and how to use them.

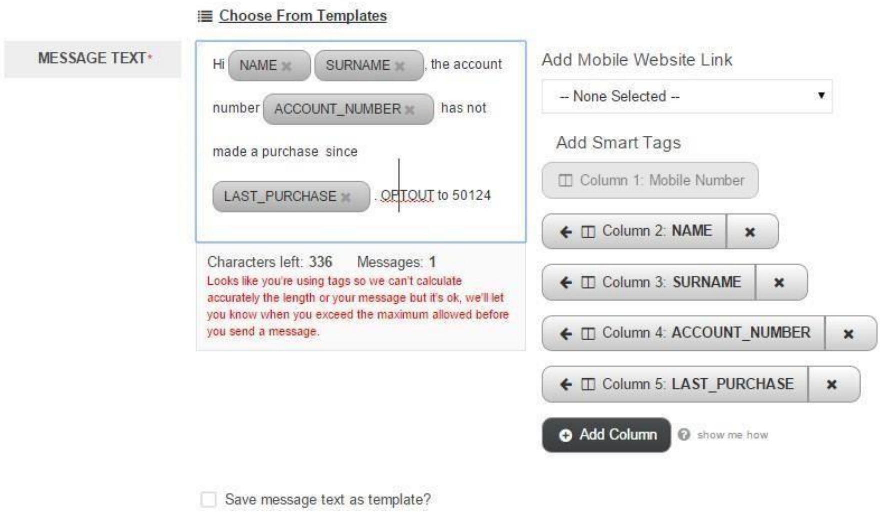
The only difference is that smart tags are automatically created when sending to a saved list.

When sending smart tags with a new file you must create them.

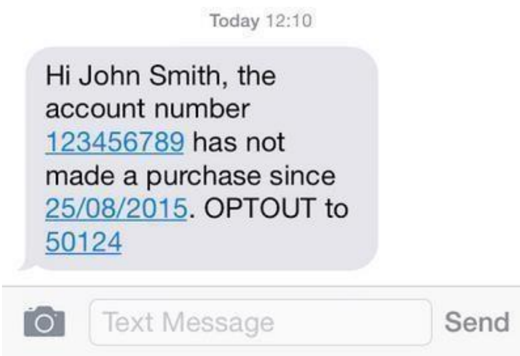
To use smart tags, first select a saved list in **Step 1** with multiple columns. The names of each column will be pulled from the list and the smart tag for each column will be displayed on the right of the **Message text** field.




Simply click on the desired smart tag on the right to enter the smart tag into the Message text.




When you send this campaign it will assign the 'name', 'surname', 'appointment date' and 'appointment time' of each individual contact to their message.




> **Note:** The Messages left and Messages figures below the Message text box will only be accurate if **Smart tags** are not used. If they are used, you will only be able to see if you have used 1,2 or 3 messages in your Message text in the**Send summary** before confirming the broadcast later.

#### 6.3.3.5 Save Message text as a template

Underneath the **Message text** field there is an option to save the message as a template. Saving a message as a template allows you to reuse commonly used SMS message content. Please see section on **Templates** for more information on managing templates.

## *6.1.6 Step 4. Send time*

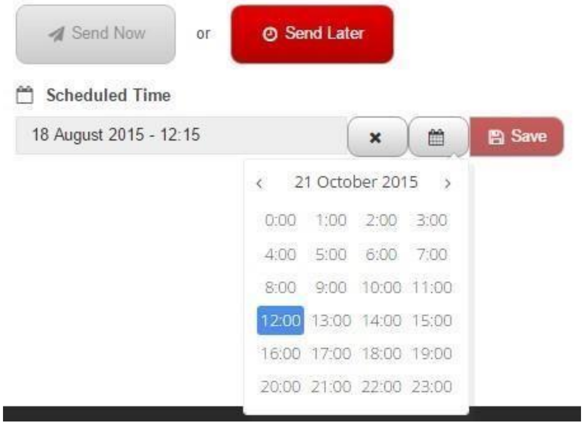

There are two options that can be selected in Step 4, **Send Now** or **Send Later**.

### 6.1.6.1 Send Now

To send the message campaign at the current time and date, click the **Send Now** button. **If the option to use dates from the Microsoft Excel© file is selected, then the campaign will be sent at the dates and times listed.** If there are no dates in the Microsoft Excel© document, the messages will begin to send straight away.

### 6.1.6.2 Send Later

Select this option if you would like all of the messages to be broadcast at a later date and time.




Options to enter a future date and time will be displayed. You will be required to select the date and time for the message campaign from these options. The messages will then be stored by the V odafone Bulk Text application to be sent at the specified future date and time.

| | |
|---|---|
| **Note:** | A message campaign that has been scheduled to be sent at a later date may be cancelled up until the selected send later date and time. Once messages in a campaign have begun to send, the broadcast cannot be cancelled. |

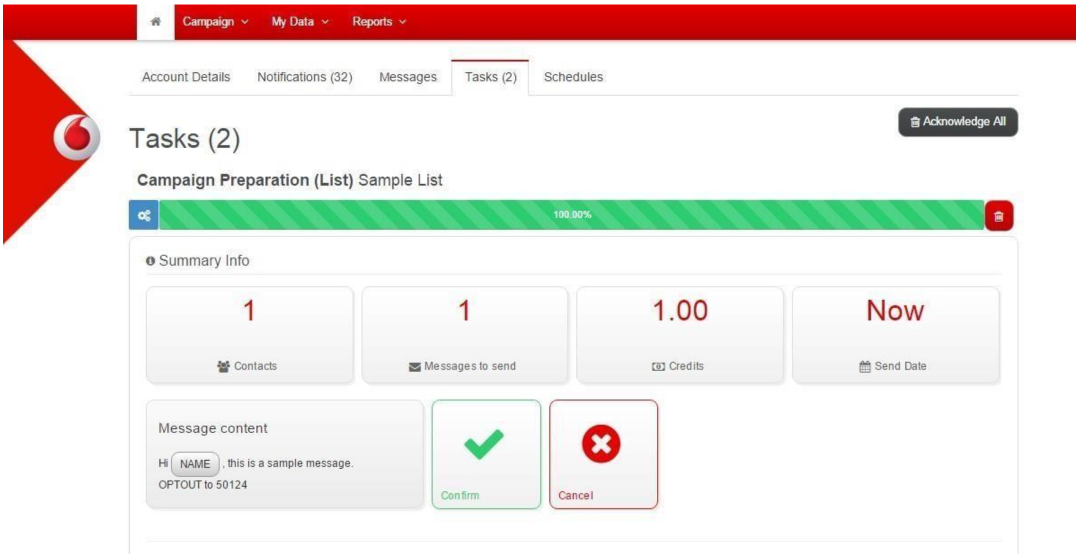
### 6.1.3.4 Confirm Campaign (Small Campaigns)

After you have selected either **Send now** or **Send later** with a campaign to a small number of contacts, if you have also selected the **Show summary?** option, you will be taken to the **Tasks** page which will ask you to confirm your campaign details before sending.

This will display the **Number of contacts; Messages to send; Credits; Send date** and **Message content.**

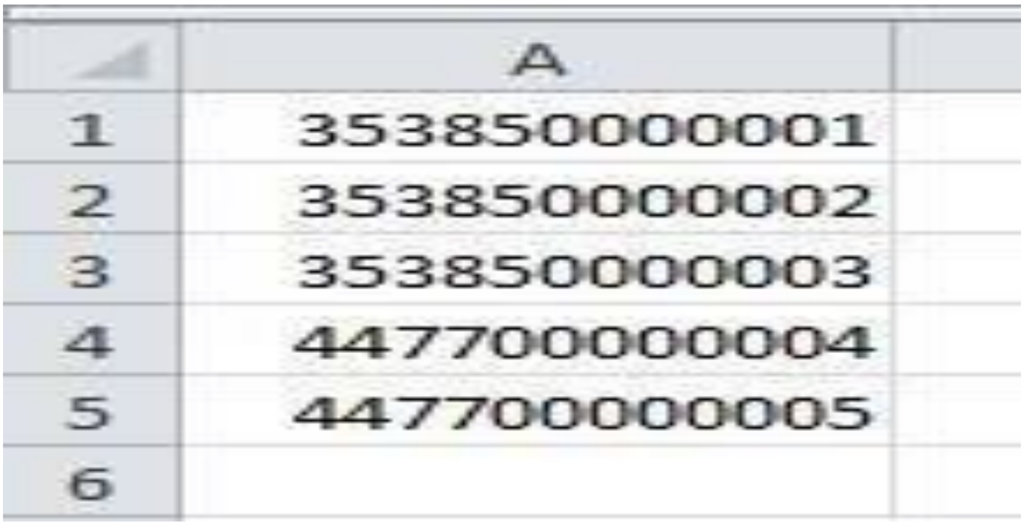
**Number of contacts** is how many recipients will receive an SMS in the campaign.

**Messages to send** is the number of total messages to be sent out and is what will be charged for. If, for example, a Message text goes over 160 characters, the number of **messages to be sent** will double as the contact will receive two messages.




If you select **Cancel**, the campaign will not be sent. You will be returned to the **Send campaign** page to amend or update details.

If the details are correct, click **Confirm** to continue. You will then be redirected to the dashboard, where the results of your message campaign can be viewed.



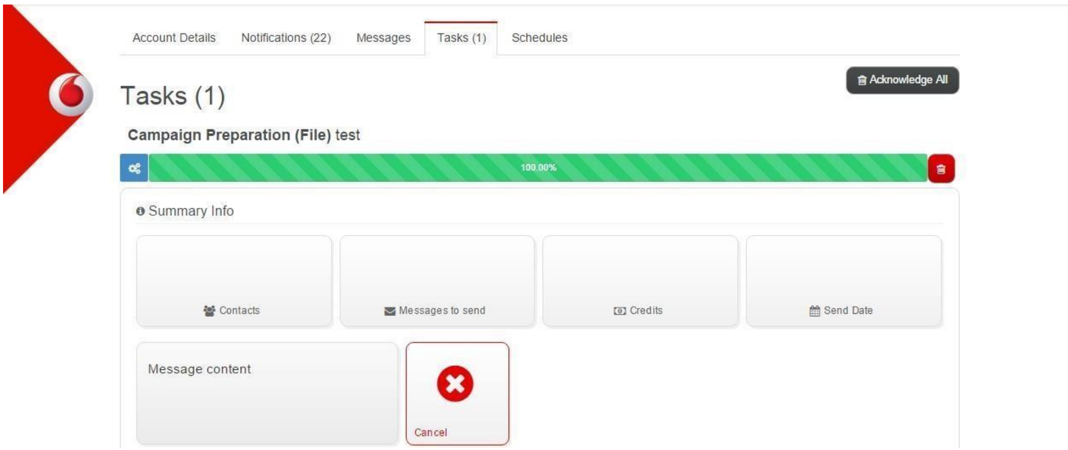
| | A |
|---|---|
| 1 | 353850000001 |
| 2 | 353850000002 |
| 3 | 353850000003 |
| 4 | 447700000004 |
| 5 | 447700000005 |
| 6 | |

#### 6.1.3.5 Confirm Campaign (Large Campaigns)

Campaigns to a large number of contacts take a little longer to process. When you send a large campaign you will be taken to the tasks page where you can view the processing of the broadcast. For more information, see the section on **Tasks**.

If the **Show summary?** box is checked then the below task will appear. The bar will load as the broadcast is processing. Once the preparation bar has reached 100% the broadcast has still not been sent. View all the broadcast information and if you are happy with it, click the green **Confirm** button to send.

If you do not want to send the campaign, click the red **Cancel** button.



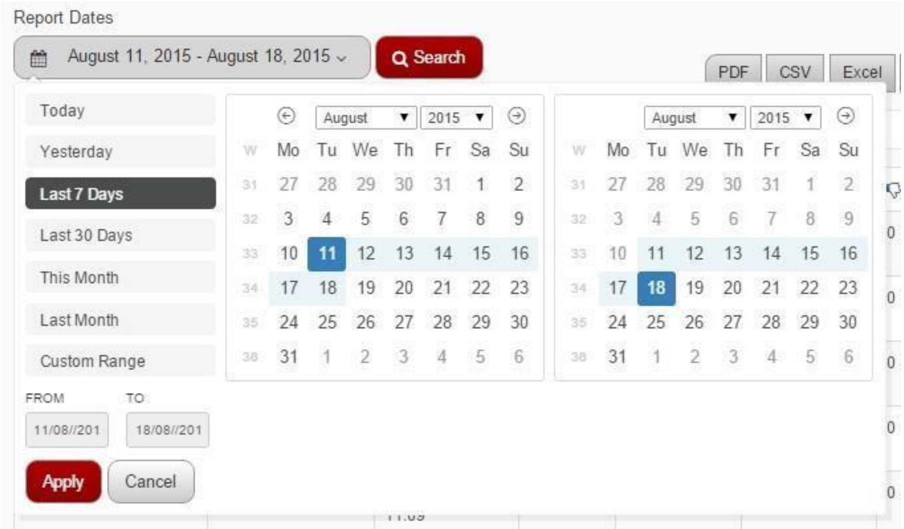

If the **Show summary?** box is not checked then the below bar will appear. Once the broadcast has finished processing you will not be asked for confirmation, it will send automatically.

# 7. Reports

From the top menu bar you can select **Reports** to view the dropdown menu from which to select your desired report. The reports contained in this section are: **Campaigns Report, Messages Report, Opt Outs Report, Credit Report, Top Up Report** and **Replies Report**.


**Report Dates**

**Report Dates** are located on the top left hand side of each report. When you have selected the report length, click the **Search** button to generate the report.

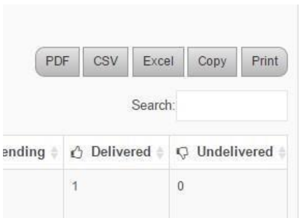



To display reports between a **Date range**, you are required to carry out the following

- Select the **Report dates** field.
- From the dropdown menu select the **Customer range** option or click the **From** or **To** fields.
- From the popup box select the desired reports range dates by clicking on the **To** and **From** dates.
- Click the **Apply** button.
- Click **Search** to generate the report.

**Copy, CSV, Excel©, PDF and Print**

These options are located on the top right hand side of some reports.




Select **Copy** to copy the contents of the report; this can now be pasted to another file.

Select **CSV**, **Excel©** or **PDF** to export the contents of the report to a file in CSV, Microsoft Excel© or Adobe PDF formats respectively. This information can then be saved or edited for future use.

Select **Print** to print the contents of the report.

Once a campaign is sent each message will be one of the following: **Pending, Sent, Delivered** or **Undelivered**. These will now be explained:

| | |
|---|---|
| **Pending:** | Messages that have been sent to the network carrier, but we are still waiting on a delivery receipt. Some messages can be delivered to the recipient, but still be classified as **Pending,** if a delivery report has not been received. |
| **Sent:** | Messages that have been successfully forwarded to the mobile network carrier. |
| **Delivered:** | Messages that have received a delivery report of 'successful'. |
| **Undelivered:** | Messages that have received a delivery report of 'unsuccessful'. |

**Report sequence**

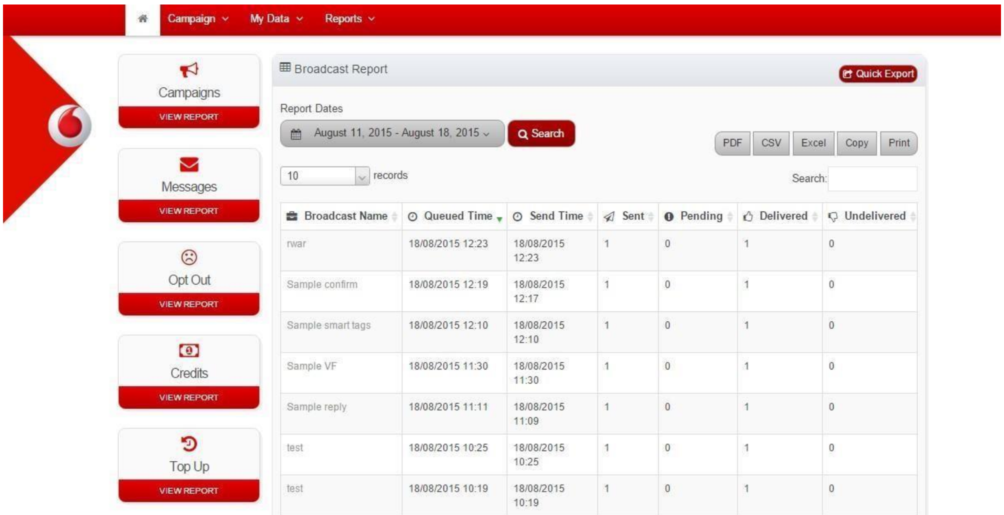
All reports' orders can be listed from the highest or lowest of any of the fields, by selecting the up or down arrow beside each of these. For **Campaign name** the results will be ordered in alphabetical or reverse alphabetical order.

**Search**

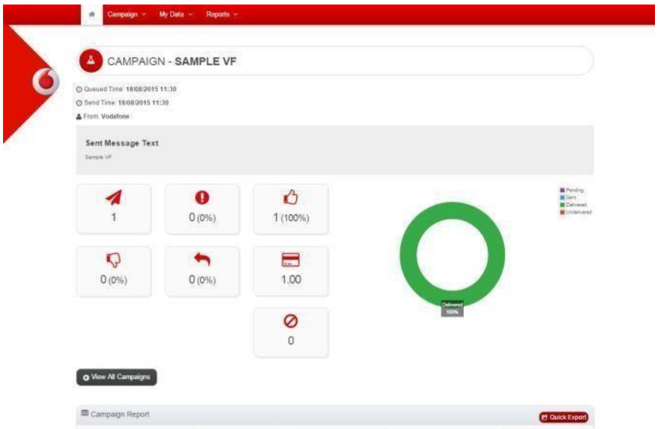
A **Search field** is located on the top right hand side of each report. This can be used to search for individual entries within a report.

## 7.1 Campaigns report

This report details all the campaigns that have been sent from your Vodafone Bulk Text account.




To view any campaign in more detail, click the name of the campaign or click the **View** button on the far right hand side of that campaign. The below screen will then be displayed.




## 7.2 Messages report

This report details the individual messages sent. Unlike the **Campaigns report** this report will detail each SMS within a campaign, and list the Message text sent.

## 7.3 Opt outs report

This report details the number of people who have opted out on each day. This includes both opt outs that have been entered manually into the **Opt outs** section of Vodafone Bulk Text and those that have opted out via SMS. For more information please see the section on [Opt outs](#).

## 7.4 Replies report

This report details the number of replies to SMS messages that you have received, as well as the content of these replies.

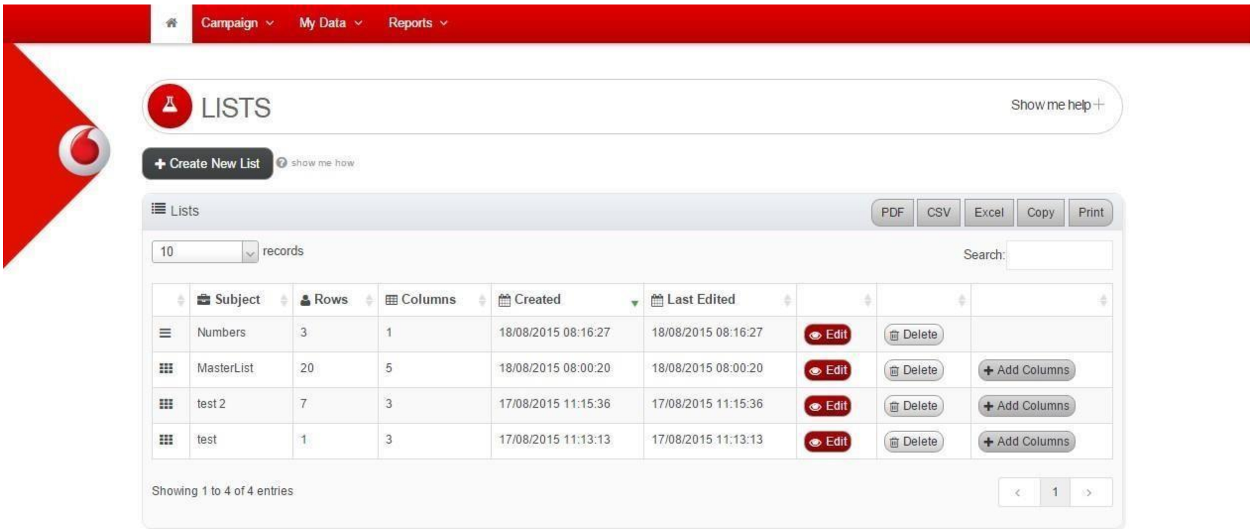
| | |
|---|---|
| **Note:** | Replies cannot be received unless you allow recipients to reply in **Campaign.** |

# 8. Lists

**Lists** are a great way of storing and managing the contacts that you send campaigns to regularly. Lists can be **uploaded**, have additional **numbers added**, have **numbers removed** and be **exported,** if required.

As well as storing the mobile numbers of contacts, lists can contain as much information regarding contacts as you like, which can be used later. This can be used to automatically personalise messages, please see section on **Smart Tags – for saved lists**, or to segment your list, please see section on **Filters**.

Select **Lists** from the **My Data** menu in the top menu bar to be brought to the lists section. You can see the lists that were created previously from this screen. You will be able to see the list names; total number of mobile numbers in the lists; the date they were created and the date they were last modified.




## 8.1 List Types

There are four different list types, each denoted by a different symbol on the left of the **Subject** line.

**Basic list:** Lists that contain only one column of information. This information must be mobile numbers.

**Advanced list:** Lists with two or more columns of information. The first column will contain mobile numbers but there can be as many additional columns as you like containing all the customer information from your CRM.

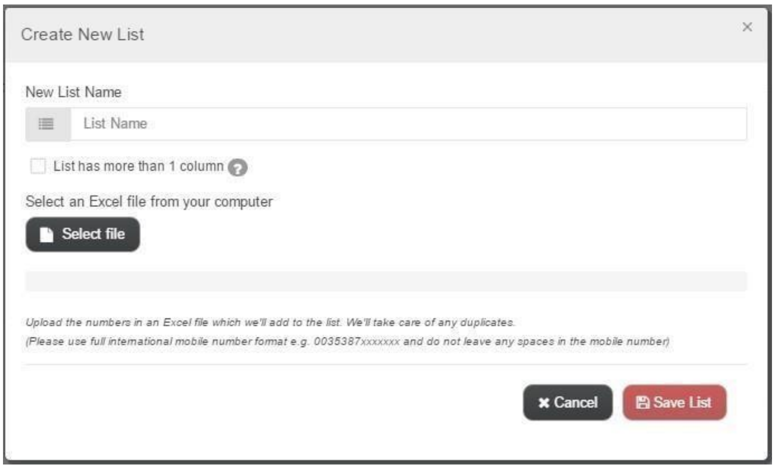
**Merged list:** Advanced lists that have had additional information added to them after creation. For more information on this, please see the section on **Add/remove information from advanced lists.**

**Master list:** Lists that are automatically updated with information from your CRM. To discuss setting up a master list, please contact your account manager.

## 8.2 Create a list

To create a list, select **Create new list** and the below popup window will be displayed. Lists can be imported from either Microsoft Excel© (.xls and .xlsx) or from a text document (.txt).

**Note:** Lists uploaded for text (.txt) files can contain mobile numbers only.




### 8.2.1 New List Name

This will be the name that the list will be saved as.

### 8.2.2 Check if your list has more than one column

If you have a simple list containing only mobile numbers (Column A) then do not check this box.

### 8.2.3 Import column names from first row

This option will only be displayed, if you have selected to create a list with more than one column. Check this box if you have used the first row of your list to name each column. If you have not named the columns in the first row, names can be added after the upload.

Please see section **Edit lists**.

### *8.2.4 Select an Excel© file (or .txt file) from your computer*

First you will be required to choose the file that you want to upload. The application allows you to upload both Microsoft Excel© files (.xls and .xlsx) and Plain text files (.txt). The files need to be formatted in the correct format, prior to being uploaded.

#### 8.2.4.1 Microsoft Excel© file format (.xls and .xlsx):

This feature requires Microsoft Excel© to be installed on your computer.

**Mobile Numbers – Column A**

The first column (column A) of the Excel© file must contain the mobile numbers of your contacts.

Basic lists will contain only mobile numbers.

| | A |
|---|---|
| 1 | 353850000001 |
| 2 | 353850000002 |
| 3 | 353850000003 |
| 4 | 447700000004 |
| 5 | 447700000005 |
| 6 | |

Mobile numbers in Microsoft Excel© files must be formatted as follows prior to being uploaded:

1. The contact numbers should be placed in the first column (Column A) of your Microsoft Excel© file.

2. The number should be formatted with the full international code, e.g. 00353861111111 or 353861111111.

3. You may need to format the first column (Column A) of the Microsoft Excel© document. Please see sections on **Formatting the Number Column (Column A)** in **Campaign Set up.**

4. Make sure that there are no breaks or empty records (rows) in the file.

5. There should be no formulas in the Microsoft Excel© cells. **Additional columns**

| | A | B | C | D | E |
|---|---|---|---|---|---|
| 1 | 353850000001 | Nigel | 19/08/1959 | Red | |
| 2 | 353850000002 | John | 20/08/1963 | White | |
| 3 | 353850000003 | Sarah | 21/08/1978 | Red | |
| 4 | 447700000004 | Mark | 22/08/1981 | Red | |
| 5 | 447700000005 | Jane | 23/08/1975 | White | |
| 6 | | | | | |

Columns after column A (column B, C, etc.) may contain any additional information relating to your contacts.

For example, if you know the first names of your contacts, you can enter the names into column B (or any other column apart from column A) with each name in the relevant row for that contact's mobile number. If you know your contacts date of birth then you can enter that into column C (or any other column apart from column A). Your file can contain as many columns as you want. **Column Names – Row 1**

Naming columns helps you to identify and sort information when using **Smart tags** and **Filters**.

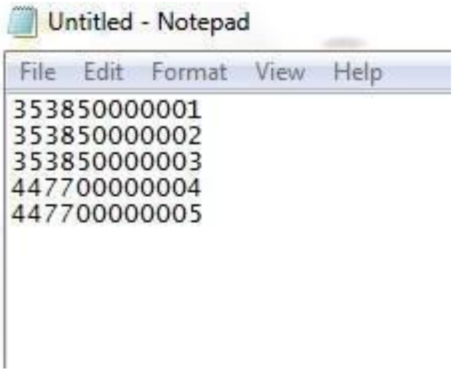
| | A | B | C | D | E |
|---|---|---|---|---|---|
| 1 | Mobile | Name | Date of Birth | Wine Preference | |
| 2 | 353850000001 | Nigel | 19/08/1959 | Red | |
| 3 | 353850000002 | John | 20/08/1963 | White | |
| 4 | 353850000003 | Sarah | 21/08/1978 | Red | |
| 5 | 447700000004 | Mark | 22/08/1981 | Red | |
| 6 | 447700000005 | Jane | 23/08/1975 | White | |
| 7 | | | | | |

In order to name a file's columns, the column names must be contained in row 1.

If your list contains names in its first row then you must check the **Import names from first row** box, when creating the list. If you have not named the columns in the first row, names can be added after the upload. Please see section **Edit lists**.

#### 8.2.4.2 Text file format (.txt):

Lists uploaded from plain SMS files can only contain mobile numbers.

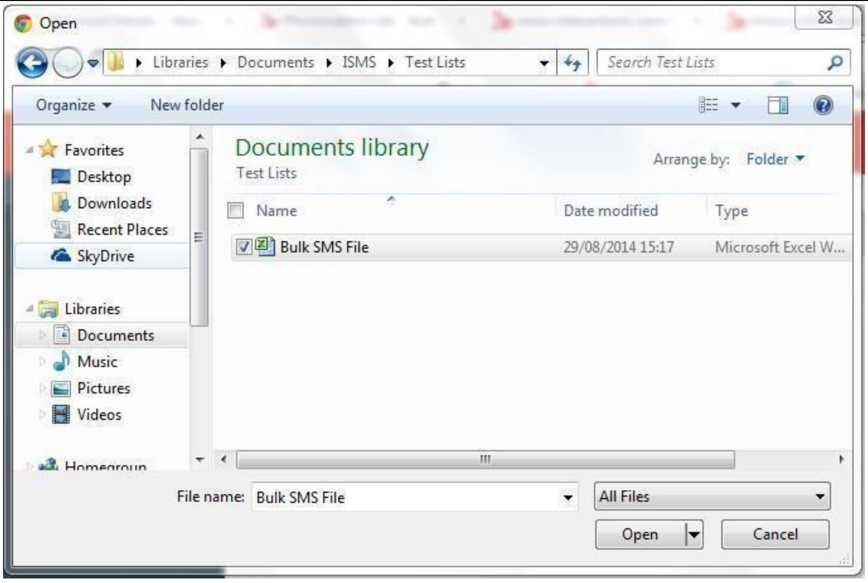



Plain SMS files need to be formatted as follows prior to being uploaded.

1. The contact numbers must be placed in a list, one above the other.
2. There is no need to separate the numbers with a comma, a new line is sufficient.
3. The number should be formatted with the full international code, e.g. 00353861111111 or 353861111111.
4. Make sure to remove all special characters and spaces, e.g. ( ) - + ' ~ etc.
5. Make sure that there are no breaks in the file.

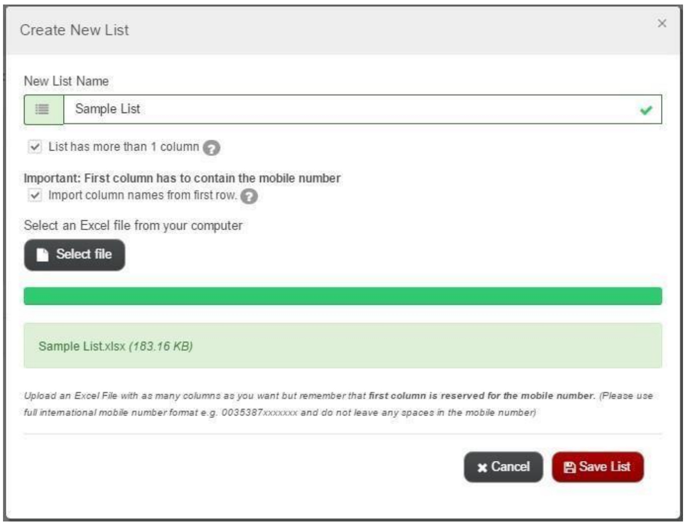
**Upload file**

Once you have formatted the file correctly, you can then browse to where your file is located by selecting the **Select file** button. The File upload window is displayed. Navigate to the correct file path location and select **Open**. *This demonstration is using Microsoft Windows operating system; the file selection method will vary for different operating systems.*




To save the uploaded file as an imported list, select the 'Save list' button.

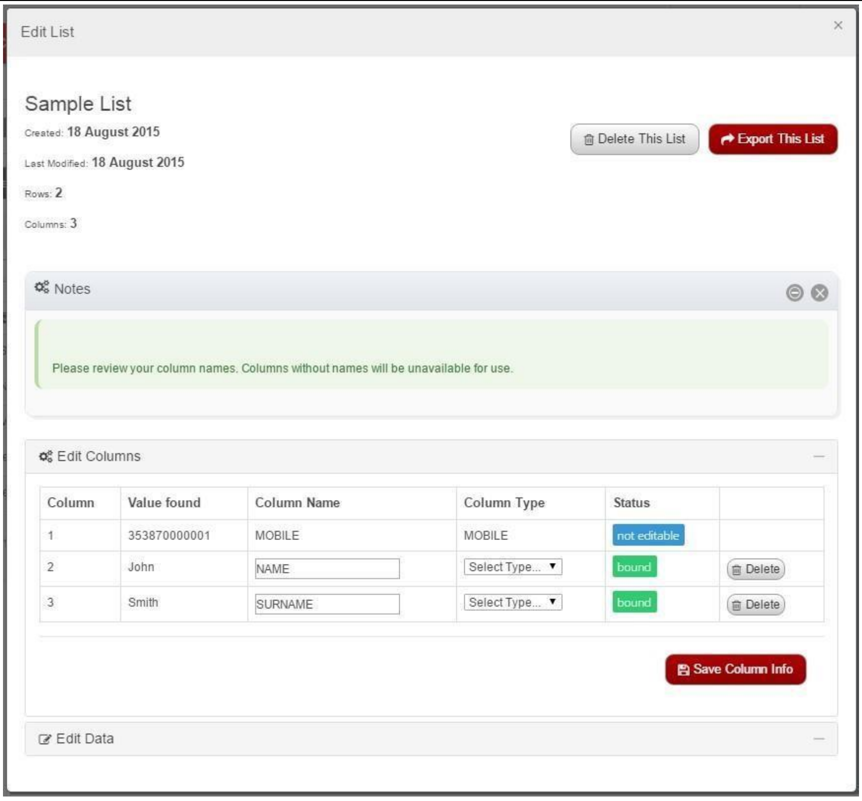
**Note:** Duplicates will automatically be removed from list entries




### 8.2.5 Edit lists

Once you have saved a new list, the above popup will be displayed. Here you can inspect how many rows and columns are contained in the list, as well as the date the list was created on and last modified on. You can also edit the lists data from this popup.

The **Delete this list** button gives you the option to delete the list from your saved lists.
The **Export this list** button gives you the option to export the list to a Microsoft Excel© file.




Select **Edit columns** and the below will be displayed. Here you can view information about the columns and edit their names. These names are used for reference when creating filters or smart tags.

The Edit List table contains the following information: **Column**, **Value found**, **Column name**,

**Column type** and **Status**.

**Column** The number of each column, where it is located in the list.

**Value found**

The value in each column for the first contact in the list. If the first row contains the column names, then these values will be taken from the second column.

**Column name**

The names of each column. If you have selected to import names from the first row, when uploading the list, then these will already be populated with the values from the first row. The values can be edited from here.

These fields will be blank if you have not selected to import names from the first row, when uploading the list. Column names can be added to your list here, even if they are not contained in the uploaded file.

**Column type** The value type contained in this column. Value types can be text, Mobile (Number), Number or Date.

**Status** The status of a column name can be: **not editable**, **not specified** or **bound**.

The **MOBILE** column is the only one that is **not editable** and cannot be changed from this status.

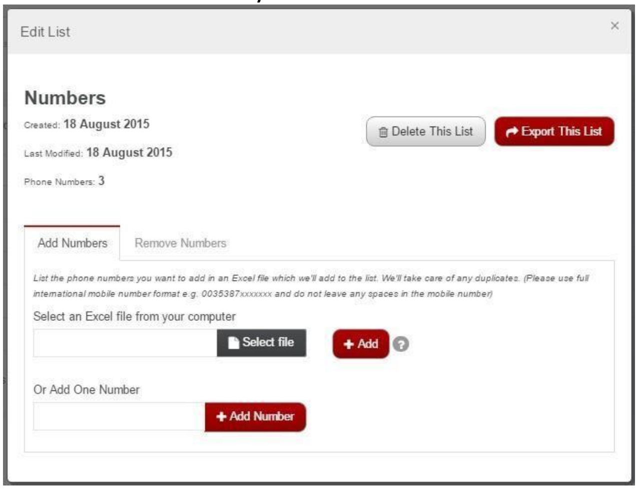
If a column has not been assigned a name, then its status is **not specified**. A name can be assigned by entering it into the text box and clicking the **Save** button on the right hand side of that column's status.

If a column has been assigned a name, then its status is **bound**. A column name can be bound by the method in the previous paragraph. Alternatively, if you have selected to import names from the first row when uploading the list, the values from the first row will automatically be bound. These can be edited by entering a new name into the text field and clicking the **Save** button on the right hand side of that column's status.

Once the list's columns are named, click the **Save list** button to exit the popup.

### *8.2.6 Add/Remove numbers from basic lists*

Contacts can be added to or removed from lists after they are saved. Numbers can be added/removed either by uploading a file of numbers or by entering numbers one by one. Only mobile numbers can be added or removed from a list with only one column.




**Add Numbers to a basic list**

To add numbers to a list with one column, you will be required to carry out the following:

1. Select the list you want to edit from the list section and click the **Edit** button on the right hand side of that list's entry.

2. Select a Microsoft Excel© file or text file to upload; the list of numbers can be added to the existing list of numbers by browsing for the correct file and selecting the **Add** button.

3. Alternatively a single number can be added one at a time by entering the number in the **Or add one number** field and selecting **Add number**.

**Remove Numbers from a basic list**

To remove numbers from a list, you will be required to carry out the following:

1. Select the list you want to edit from the list section and click the **Edit** button on the right hand side of that list's entry.

2. Select a Microsoft Excel© file or text file to upload. The list of numbers can be removed from the existing list of numbers by browsing for the correct file and selecting the **Remove** button.

3. Alternatively a single number can be removed, one at a time, by entering the number in the **Or remove one number** field and selecting **Remove number**.

### *8.2.7 Add information from advanced lists*

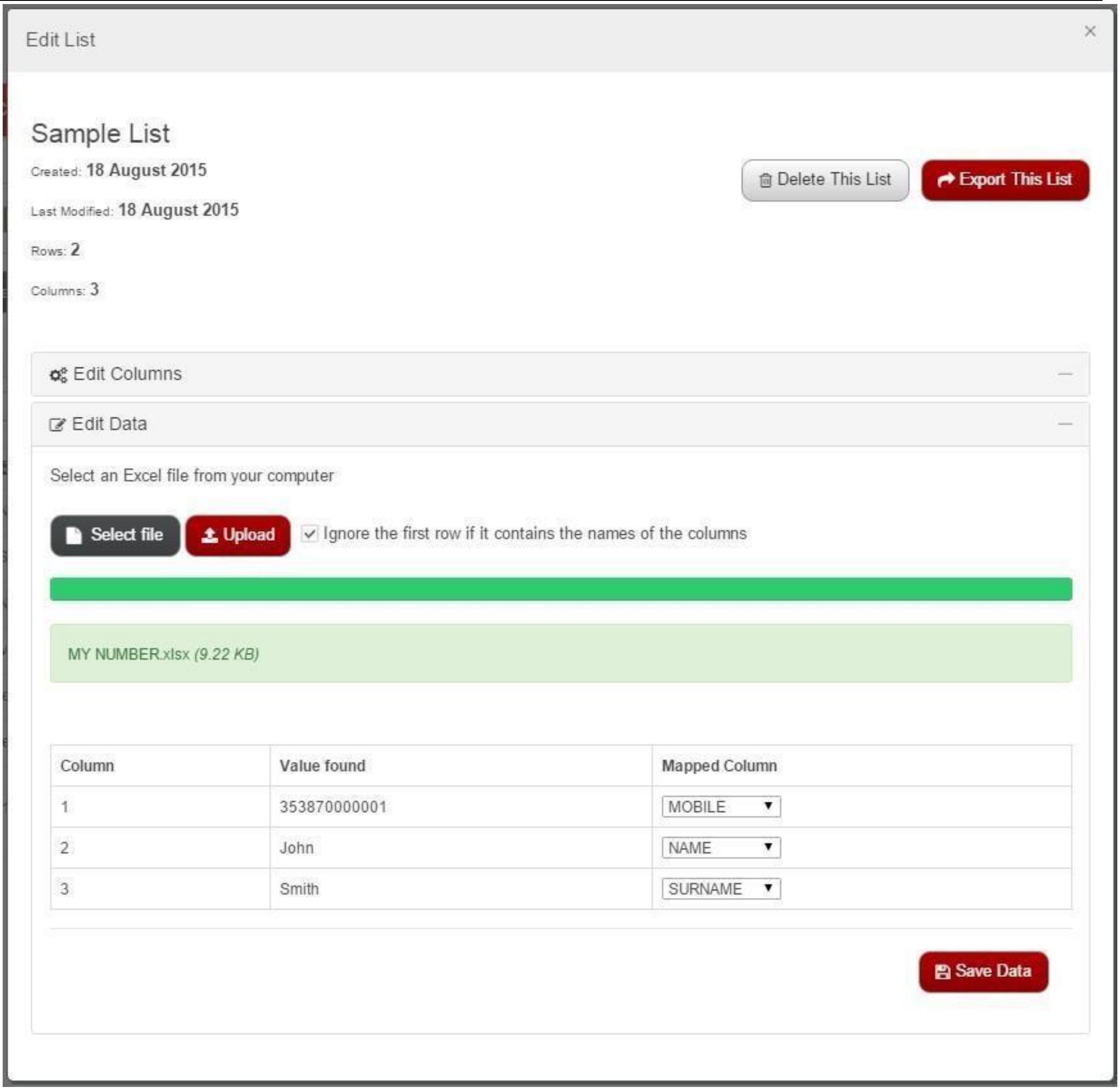
Advanced lists can be updated to include additional contacts and/or additional information about existing contacts. This is done by uploading the additional information in a Microsoft Excel© spreadsheet.

In the edit menu beside the list you would like to add information to, select **Edit Data**. Select the file from the computer that you would like to add to your existing list.

**Mapped Column**

Whichever column you choose to map each new column to, the new information will be added onto that column as additional rows. A dropdown menu will be displayed, it contains the existing columns, one of which you must select to be the column that the new information is mapped to.

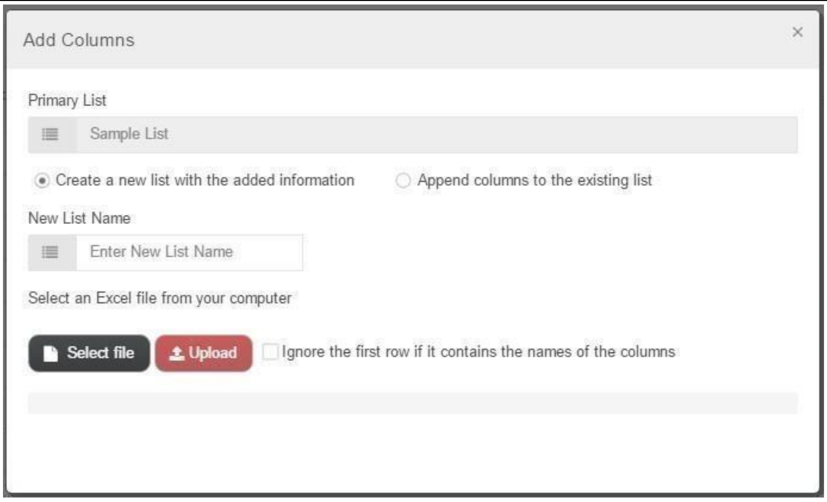
Select **Save Data to update the list.**




**To merge a list with only one column mapped**

To the right of the advanced list that you want to edit, select the **Add column** button.

The below popup will be displayed.




**Primary list**

This is the name of the list that you have selected to add columns to.

Below this you have two options of which you must check one.

**Create a new list with the added information**

This will create a brand new merged list that will contain the information from your primary list and the information you have uploaded.

Once this option is selected, enter a name for the new merged list in the **New list name** field.

**Append columns to the existing list**

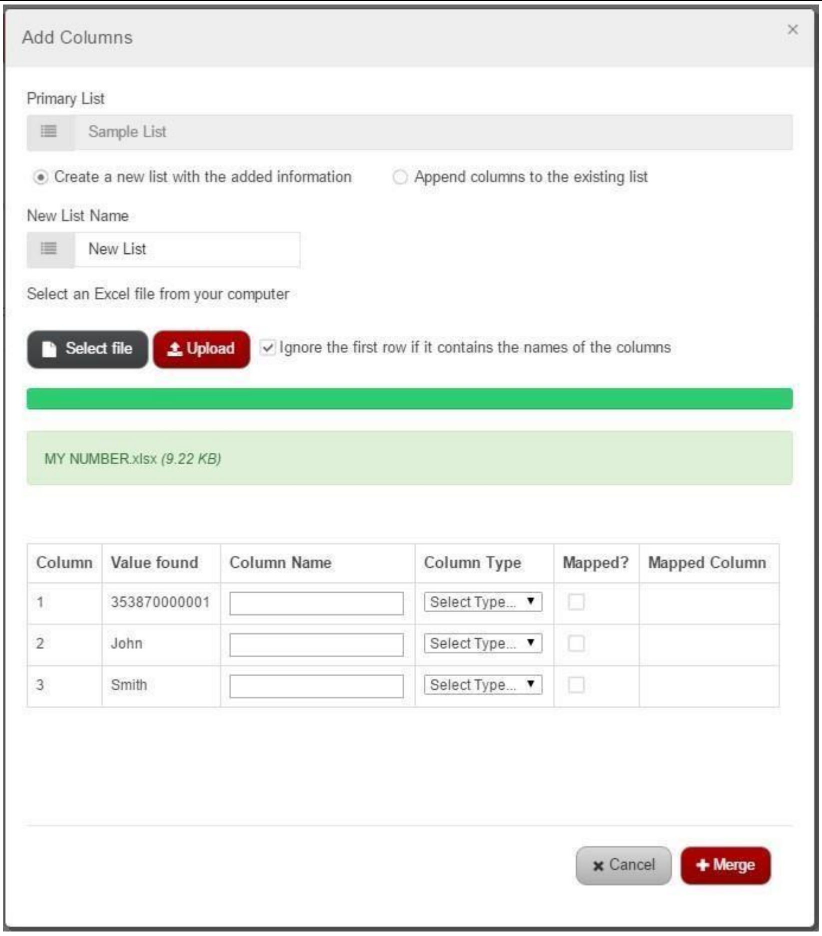
This will edit your primary list by adding the information from your Excel© spreadsheet. Once you append the columns to a list, the list will be overwritten and cannot be undone.

**Select an Excel© file from your computer**

Next select an Excel© file from your computer that you have already saved with the information that you would like to update your list with. To see how to format an Excel© spreadsheet, please see the section on **Select an Excel© file (or Sms file) from your computer**, in the **Lists** section.

Select the **Ignore the first row if it contains the names of the columns** if your Excel© spreadsheet contains the names of each column in the first row. If it doesn't, these can be added later.

Once the file is selected, click the **Upload** button. The below popup screen will then appear.




**Column name**

Enter the name you would like for each column.

**Column type**

Select whether the columns values are **Text, Mobile, Number** or **Date**.

**Mapped?**

Select one box to map a column, the new information will be added onto that column as additional rows. Columns that are not mapped are added to the list as new columns.

**Mapped column**

When you have selected to map a column, a dropdown menu will be displayed here. It contains the existing columns, one of which you must select to be the column that the new information is mapped to.

**Complete the merge**

If you are happy to merge the information into an existing advanced list or to create a new merged list, click the **Merge** button.

To **cancel** the process select the Cancel button and the list will remain unchanged.

### *8.2.8 Delete or export lists*


The **Delete this list** button gives you the option to delete the list from your saved lists at this stage.

The **Export this list** button gives you the option to export the list to a Microsoft Excel© file.

**EXPORT LISTS**

Lists can be exported to Microsoft Excel© files.

Select the list you want to export from the list section and click the **Edit** button on the right hand side of that list's entry. Select **Export This List** on the top right of the popup.

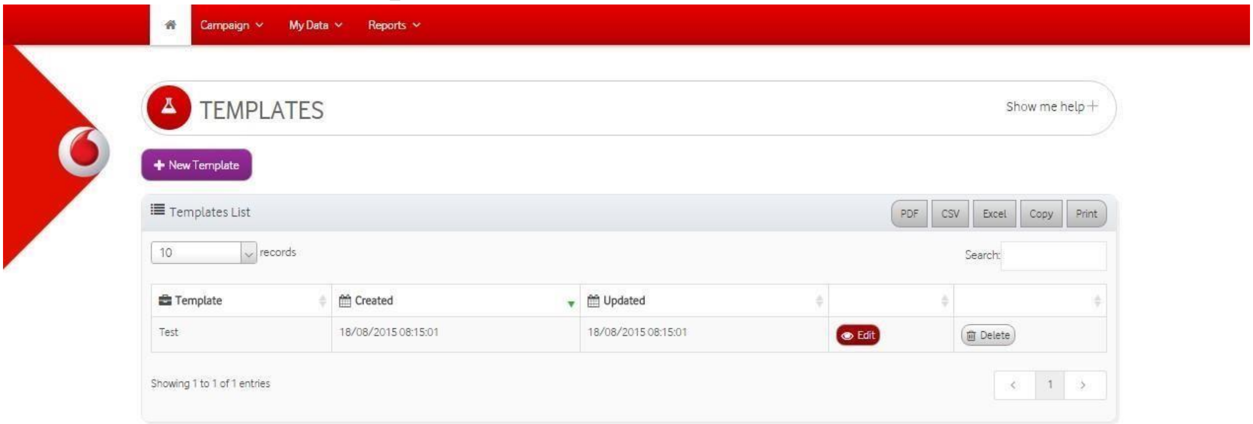
**DELETE LISTS**

To delete a list, select **Delete** on the far right hand side of the list that you want to delete from the **Lists** page.

The list will now be permanently deleted.

| | |
|---|---|
| Note: | Uploaded files need to be in the correct file formats. See the **Creating a new list** section for details on file formats. |

# 9. SMS Templates



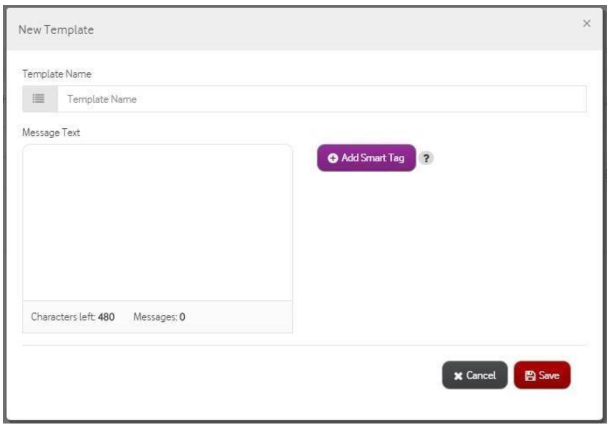

Saving a message as a template allows you to reuse SMS message content. You can add message templates up to 480 characters. A standard message is 160 characters, and using templates with more than 160 characters will result in multiple credits being charged per message sent. Please see section on **[Message text]** in **Campaign set up**.

Templates can include smart tags. Please see below section on **[Smart Tags in templates]**. If you add any smart tags to a template, please keep in mind that you will only be able to send the template to lists that have corresponding column names.

Message templates that you have previously saved can be viewed on the **Templates** screen, which can be accessed from the top menu bar menu by selecting the **Templates** button from the **My Data** menu.

## 9.1 Add a new template

Click the **New template** button on the **Templates** page to display the below popup.

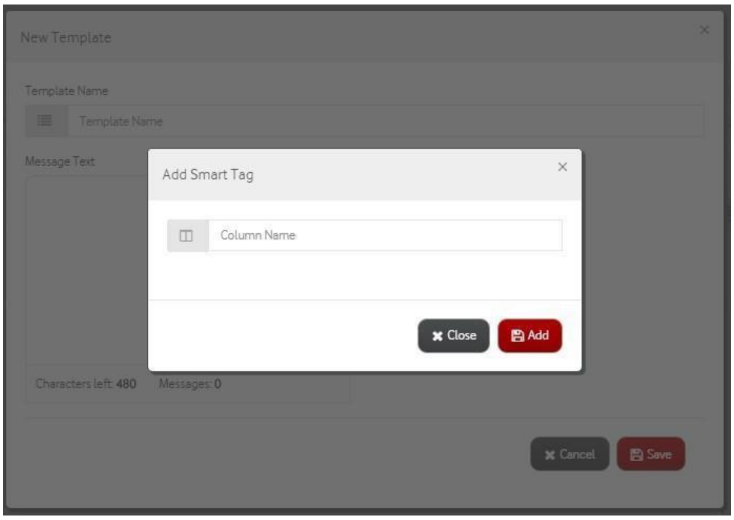



Type a template name into the **Template name** field. This is used to identify your template when searching for it in future. It is not sent to the recipient.

Type the template text that you would like into the **Message text** field. You can add message templates up to 480 characters. Though a standard message is 160 characters, and using templates with more than 160 characters will result in multiple credits being charged per message sent. Please see section on [Message text](#) in **Campaign set up**.

**Smart tags in templates**

Smart tags can be added to message templates in order to automatically personalise messages with values from a file/list. Please see section on [Smart Tags – for a saved list](#). To add a smart tag click the **Add smart tag** button on the **Templates** page; the below popup will then be displayed.




Enter the name of the Microsoft Excel© file's column into the **Column Name** field. Select a column name that is contained in a list/file that you have uploaded or are going to upload. The smart tag name must be the same as a column name from the file/list being sent to in order to work. Once you have entered a smart tag name, click the **Add** button.

Your smart tag will now appear on the right hand side of the **Message text** Field. To add the smart tag to the template, simply click on the smart tag.

You can add multiple smart tags by following the same method.

If your template includes smart tags, then the number of characters used in the message cannot be accurately calculated at this stage. This is because each message sent containing a smart tag will contain different data length. However, when you reach the **Confirm campaign** stage in **Campaign set up**, you will be informed if the messages being sent contain more than 160 characters.

To save the template, click the **Save** button. The new template will be added to your available list of templates.

### 9.2 Delete - Templates

To remove a template, select the **Delete** button on the far right hand side of the template to be removed.

## 10. Opt outs

| | |
|---|---|
| **Important:** | All bulk SMS campaigns must contain an **Opt out** option at the end of each message.<br><br>For Vodafone Bulk Text clients sending SMS to Republic of Ireland mobile phones the opt out should be written as one of the following:<br><br>***"Text STOP to 50124"***<br><br>***"Text OPTOUT to 50124"***<br><br>***"Text OPT OUT to 50124"***<br><br>The recipient then has the option to send one of those keywords (STOP, OPTOUT OR OPT OUT) to 50124 (free of charge) if they no longer wish to receive any messages from your Vodafone Bulk Text account.<br>The recipients will then automatically be added to your **Opt out list** and will no longer be able to receive SMS from your account.<br><br>**It is a legal requirement to offer a free of charge opt out option with all marketing SMS. The charge for the opt out SMS is paid by the bulk SMS account holder.** |

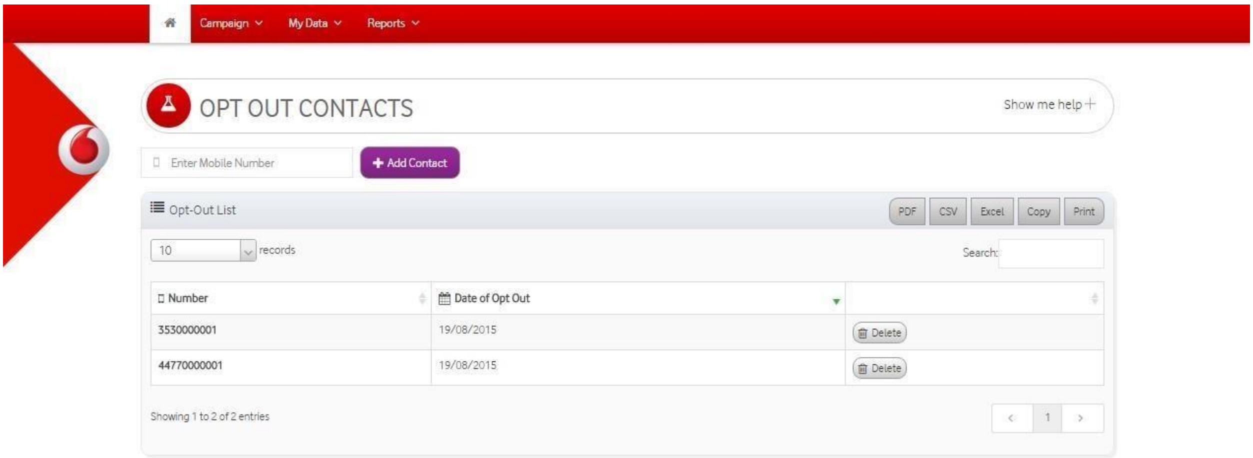
### 10.1 Opt out contacts

You can add numbers to your **Opt outs list** so that messages will not be broadcast to the selected numbers. This opt outs list is checked before any further broadcasts are sent; numbers in the opt outs list will not receive messages from your account.

Contacts can also opt out from receiving messages from your account by texting in a keyword. Please see the SMS box above for more information on **Opt outs**.

## 10.2 View opt outs

To view all opt out contacts you can either step through each of the pages in the **Opt Outs** page of the **My Data** menu or you can export the numbers in **CSV**, **Excel©** or **PDF** format. You can also **Copy** the opt outs to be pasted into a file or **Print** a list of the opt outs. These options are available on the top right hand side of the **Opt outs List**, please see below.




You can also **Search** to see if individual numbers are in your opt outs list by entering the number into the search field

## 10.3 Add a new contact to opt outs list

Contacts can be added to the opt outs list in the **Opt Outs** page in the **My Data** menu on the top menu bar. Here users can add numbers to the list manually, by entering the number into the **Enter mobile number** field and selecting **Add contact**.

When entering the mobile number, please remember to enter the number using the following rules:

1. The number should be formatted with the full international code, e.g., 353861111111 or 0035386111111.

Make sure to remove all special characters and spaces, e.g., ( ) - + ' ~ etc.

## 10.4 Remove a contact from opt outs list

Contacts that have been added to the opt outs list can be removed from the list by selecting **Delete** beside the contact to be removed. Once removed, this user will now be able to receive messages again.

| Number | Date of Opt Out | |
|---|---|---|
| 3530000001 | 19/08/2015 | Delete |

There is a **Search** field on the top right of the **Opt Outs** page. To search if a number is included in your opt outs list, enter it into this field. If it is an opt out contact then it will appear. It can then be deleted from the list if required.

### 10.5 Shared Optouts Feature

This is implemented in the Manage Admin portal and associated functionalities on the Vodafone Portal, designed to optimize Opt-Out management for Parent and Child accounts. Key functionalities include:

- Centralised Control:
    - Parent accounts can now choose to remove the opt-out management capabilities for Child accounts.
    - This ensures only parent accounts retain control over the opt-out list.
- Automated Message Blocking:
    - When campaigns are sent, MSISDNs on the opt-out list are automatically excluded from receiving messages.
- Consistency Across Account Hierarchies:
    - Child accounts can reference the parent's opt-out list, ensuring consistent message blocking for blacklisted MSISDNs across the account hierarchy.
- Mobile Lookup Enhancements:

A new filtering option on the Mobile Lookup Page for Parent accounts to select specific Child accounts along with a new column for account names

#### 10.5.1 Shared Optouts Feature Overview

Only Super Administrators and Parent accounts can enable the shared opt-out feature. Parent accounts can add or remove entries from the Opt-Out List, while Child accounts have view-only access. MSISDNs are automatically added to the Parent opt-out list when users send a "STOP" message to 50124, even if the campaign was sent from a child account.

Once this feature is enabled, it cannot be reversed due to the risks associated with managing the optout lists. A new parent account can be created for child accounts managing their own optout list.

#### 10.5.2 How to View Optouts List

To view the Parents and Child Optouts list, log in to the portal: [https://bulktext.vodafone.ie/](https://bulktext.vodafone.ie/), navigate to **My Data**, and select **Optouts.**

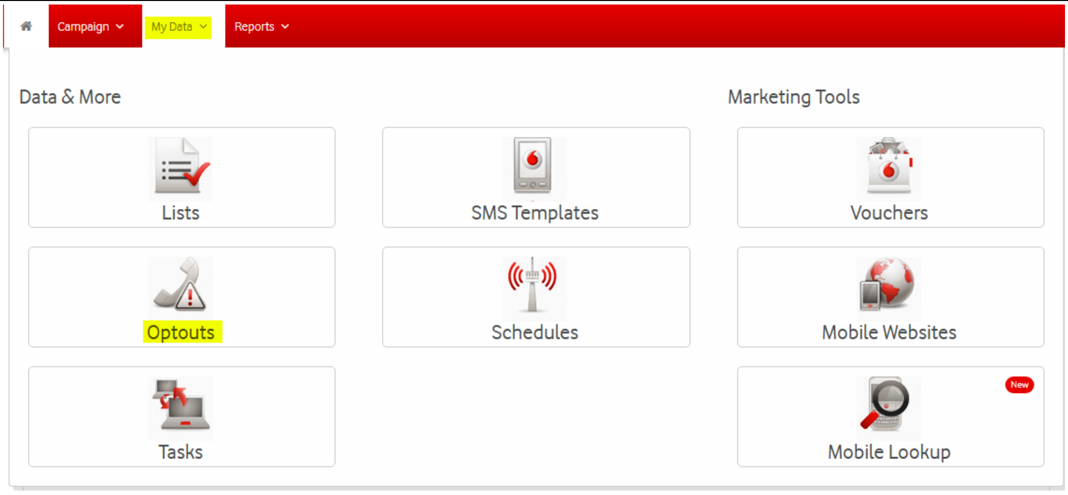



*Figure 1 Optouts List*

### 10.5.3 Optouts Menu – Shared Optouts feature not enabled

Before enabling the shared optout list function, both parent account and child account can independently add or remove numbers from their optouts list. Duplicates can exist across the accounts. Below is an example of how a parent and child account appear before enabling shared optout list function.

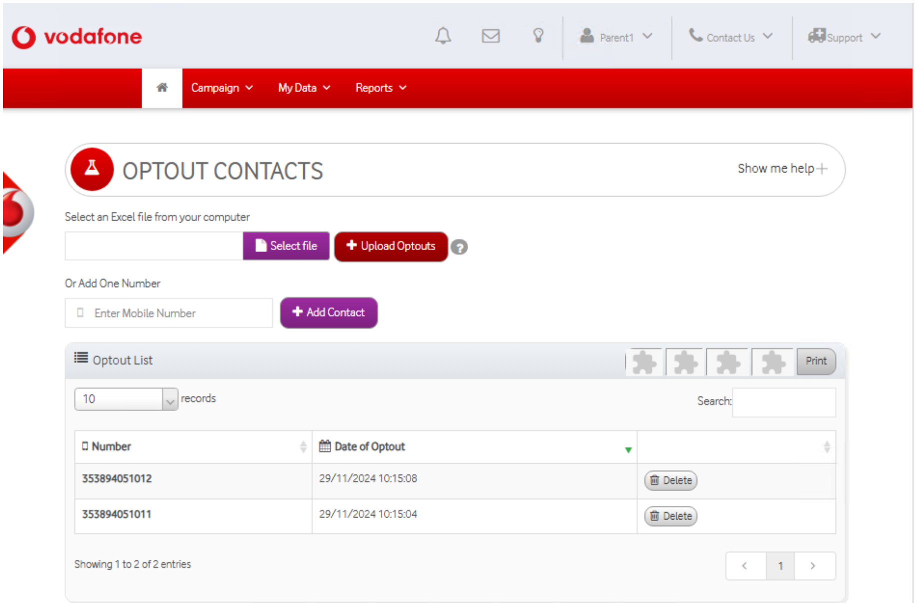



*Figure 2 Parent Account Optout*

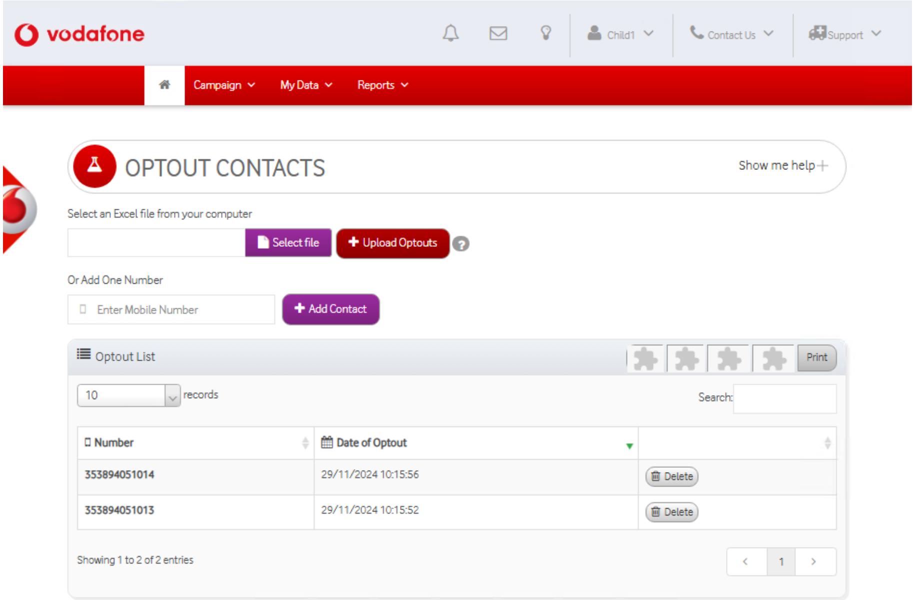



*Figure 3 Child Account Optout*

### 10.5.4 Optouts Menu - Shared Optouts feature enabled

Parent users can log into the ManageAdmin portal via Vodafone Bulk Text URL: [https://bulktext.vodafone.ie/](https://bulktext.vodafone.ie/)

Once inside the ManageAdmin portal, go to your account. On the left navigation menu, under **Current Client**, click on **Shared Optout List.**

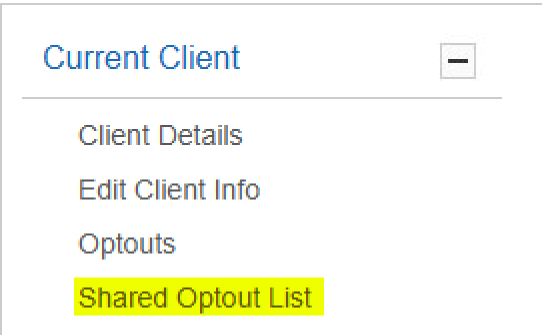



*Figure 4 Shared Optout List Nav bar*

Select **Enable Shared Optout Lists**. Then select **confirm.**

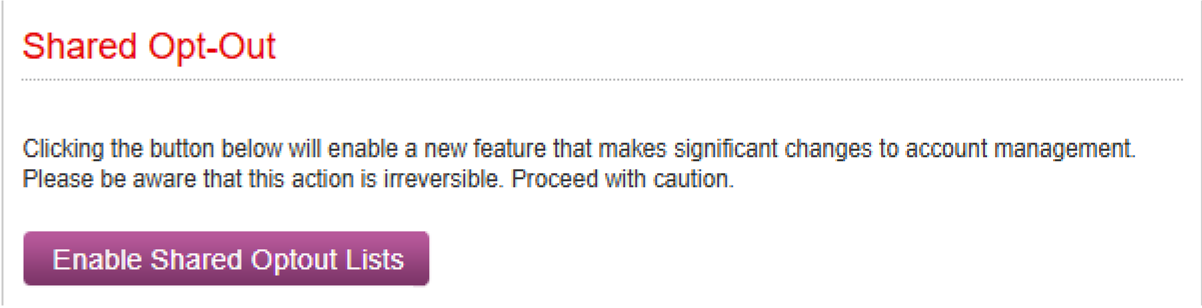



*Figure 5 Enable Shared Optout*

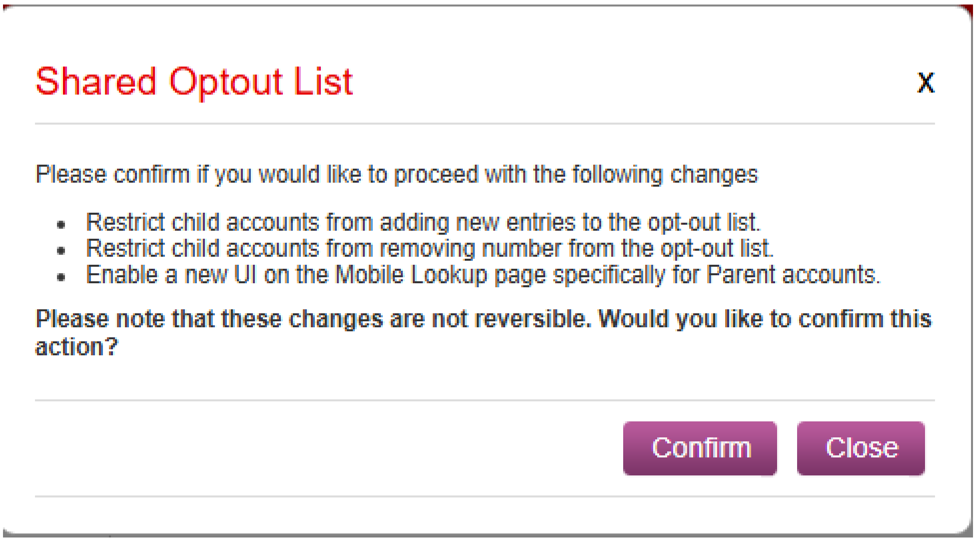



*Figure 6 Confirm Shared Optout List*

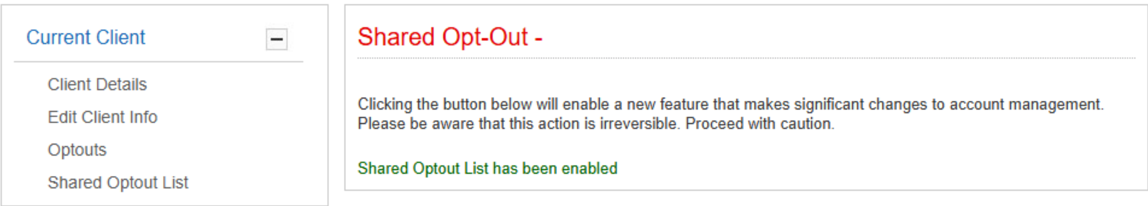



*Figure 7 Enabled Shared Optout List*

Once it’s enabled, the Parent account can view both its own optouts and those of its child accounts. Any duplicate entries between the shared accounts will be removed. Now only the Parent account can add or remove from the shared optout list. This feature is **not reversible**

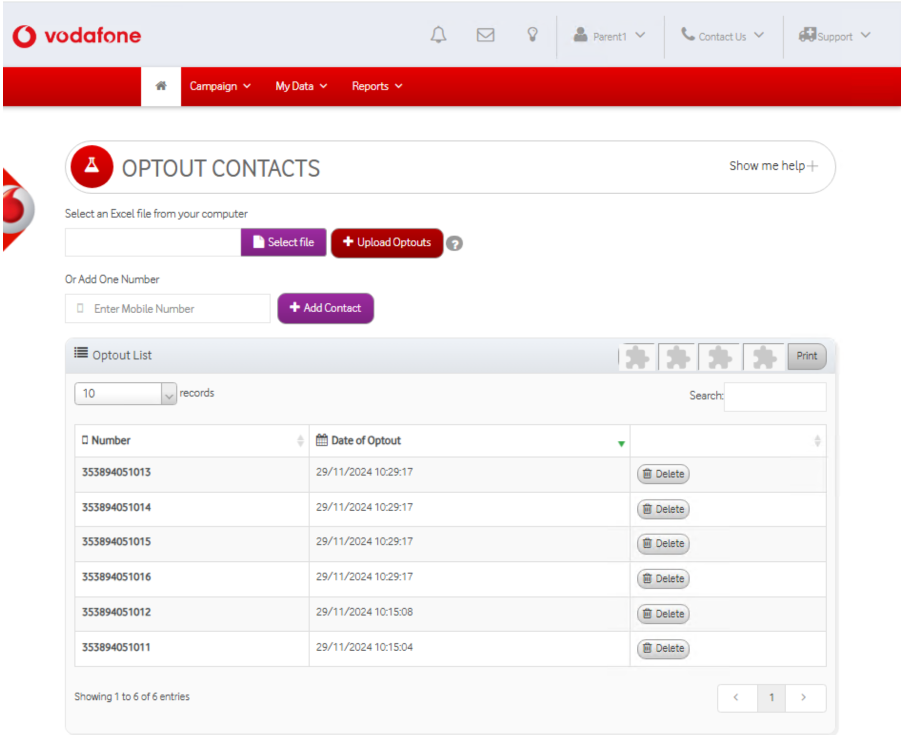



*Figure 8 Parent Account – Enabled Shared Optout List*

Child account can only view the optout list.

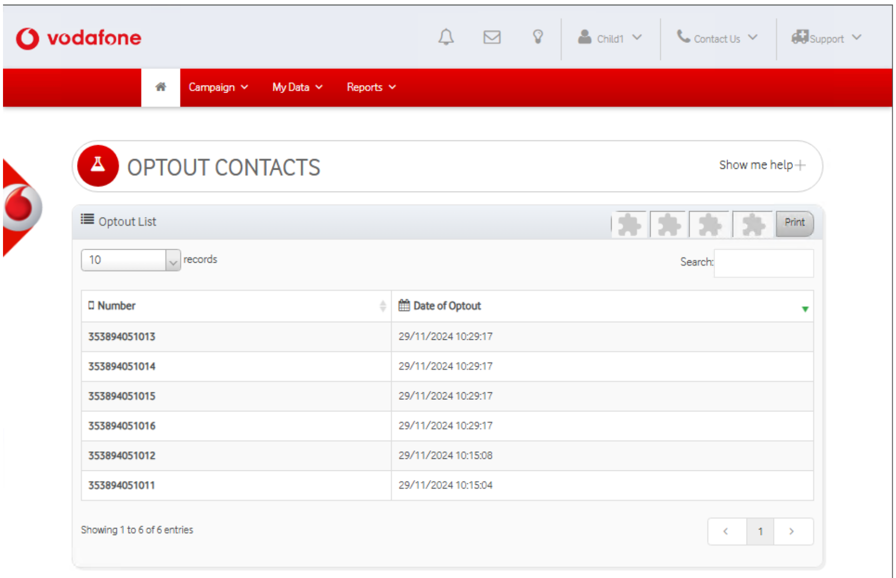



*Figure 9 Child Account - Enabled Shared Optout List*

### 10.5.5 Mobile Lookup Menu - Shared Optouts feature not enabled

Navigate to Mobile Lookup as shown in the below image.

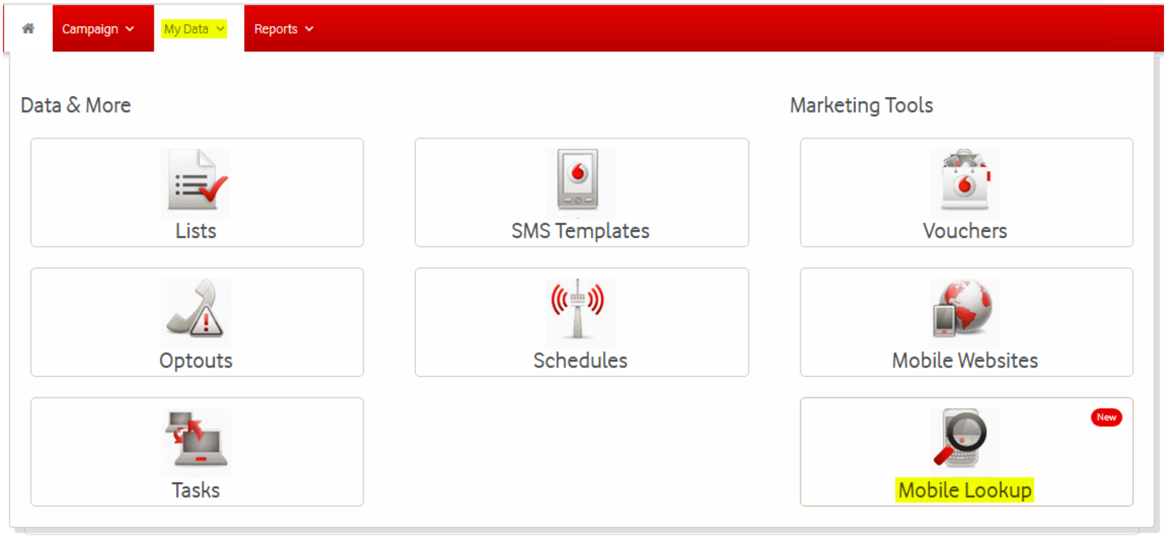



*Figure 10 Mobile Lookup*

Before enabling shared optout list, there is no filtering feature available and searches are limited to numbers associated with the specific user.

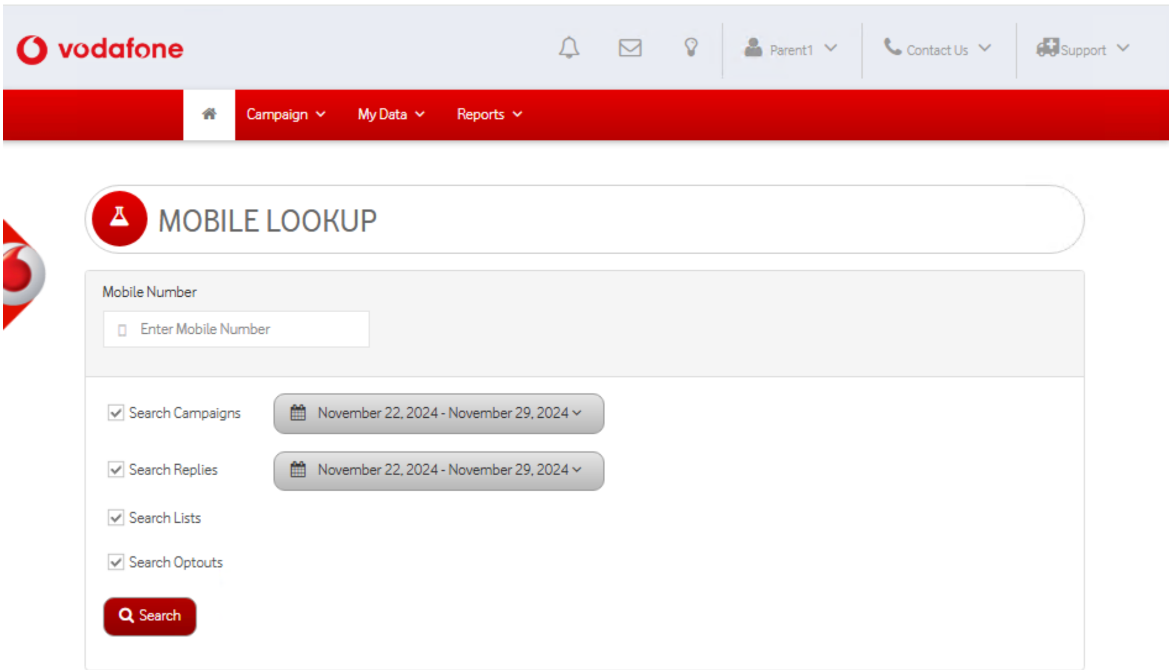



*Figure 11 Mobile Look - Before Shared Optout List Enabled*

### 10.5.6 Mobile Lookup Menu - Shared Optouts feature enabled

With the shared optout list enabled, now the users have the option to filter by clients or view numbers when performing a search.

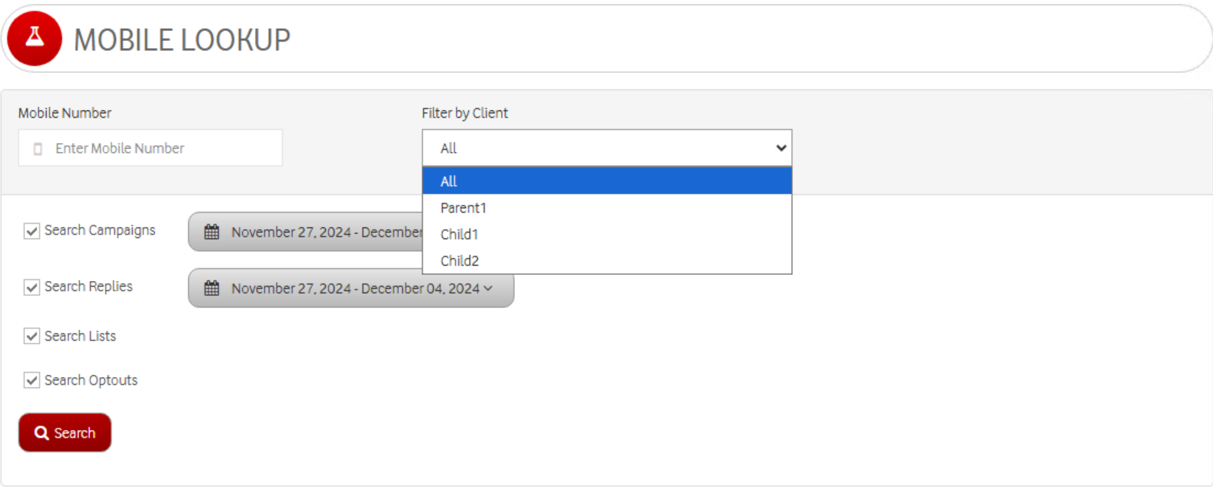
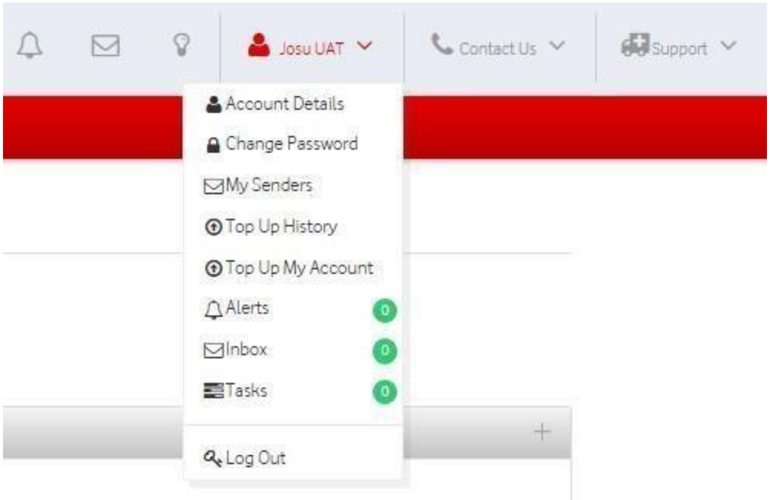



*Figure 12 Mobile Look - After Shared Optout List Enabled*

# 11. Account Details

Located on the top right hand corner in the drop down menu below the name of your account is the **Account details** menu. This allows you to view and make changes to your account details.




There are four options available from this drop down menu:

- Account details
- Change my password
- My Senders
- Top up history

These options are explained in detail in the following sections.

## 11.1 Account Details

If you wish to view or change any account details, select **Account Details** in the **Account Details** menu.

On this screen you will be able to make changes to your account details. The fields are:

**Email/Username, First name, Last name, Mobile number, Landline, Address, City, County** and **Country.**

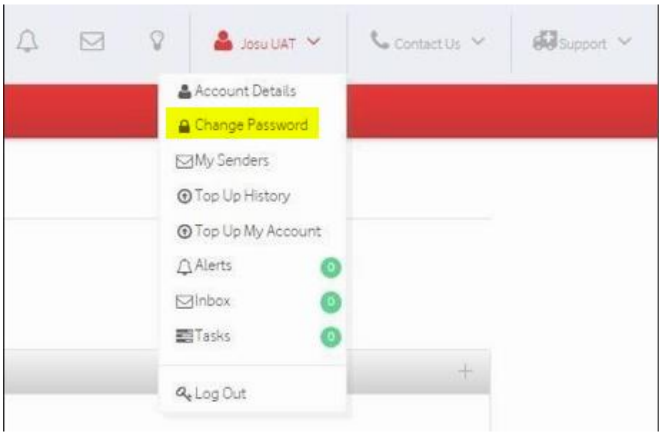
For an explanation of each of the account fields, please see the section on **Registration**.

When you are finished, click the **Update details** button to save the changes.

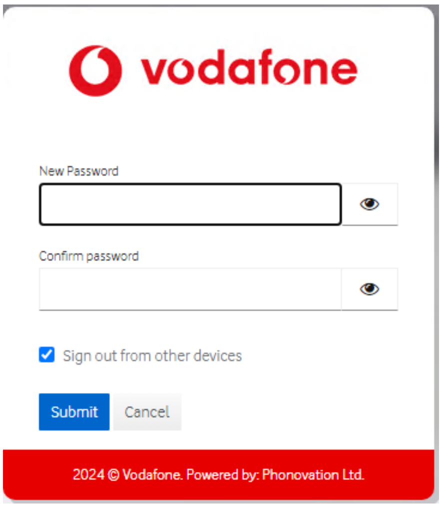
## 11.2 Change your password

**Change Password**

If you wish to change your password, select **Change Password** on the **Account details** menu.




The Change Password Screen is displayed.

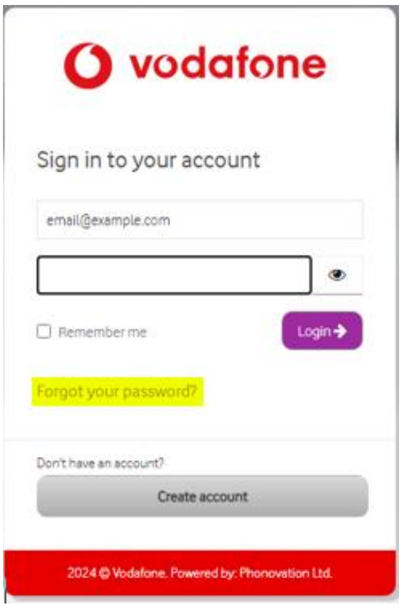


You will be asked to insert a new password. You need to confirm the new password by entering it a second time. Select **Submit** for the changes to take effect.

- **Passwords must:**
    - Contain at least 8 characters
    - Contain at least one lower case letter
    - Contain at least one upper case letter
    - Contain at least one special character (e.g. @,!,/)
    - Contain at least one digit
    - Not be the same as recently used passwords

**Change forgotten passwords**

If the login password has been forgotten you can get it reset by selecting the **Forgot your password?** link on the login page.




Please see the section on [Forgot your password?]

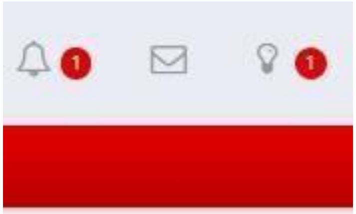
## 11.3 My Sender Names

If you wish to view your available sender names (the name that a message recipient will see as having sent the message), select **My Senders** in the **Account details** menu on the top menu bar.


Here will be displayed your available sender names. If no sender names have been set up, then the default will be **FreeText.** To see how to set up a sender name or for more information on sender names, please see the section on **Sender names.**

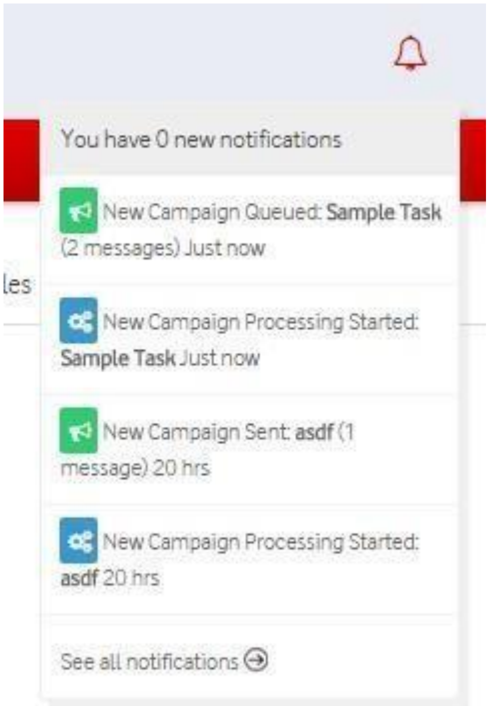
# 12. Notifications, Messages and Tasks

Notifications, Messages and Pending Tasks are alerts that all combine to keep you in complete control of all your Vodafone Bulk Text activity.



These alerts are located on the right hand side of the page. The number of new alerts will be displayed, alongside that alert's symbol. To view your alerts, select the desired symbol to display the dropdown list. To view an alert in more detail, select the desired alert.

To view all of your alerts, select **See all notifications/messages/tasks** option at the end of the dropdown list.



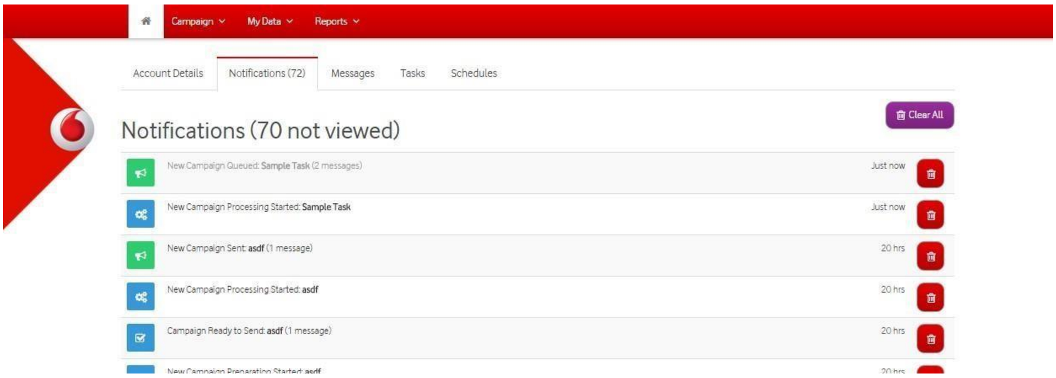

To delete an alert, select the **Delete** symbol ( ) on the right hand side of that alert.

All Notifications, Messages and Tasks can also be viewed from the **Account details** page. Select any of the **Account details** options from the dropdown list on the top right of the page. You can then select the **Notifications**, **Messages** and **Alerts** tabs on the right of the **Account details** tab.

## 12.1 Notifications

**Notifications** are sent to your Vodafone Bulk Text account to inform you when a campaign has been sent, scheduled, processed or failed.

Delete all existing notifications by selecting the **Clear all** button on the top right of the page.



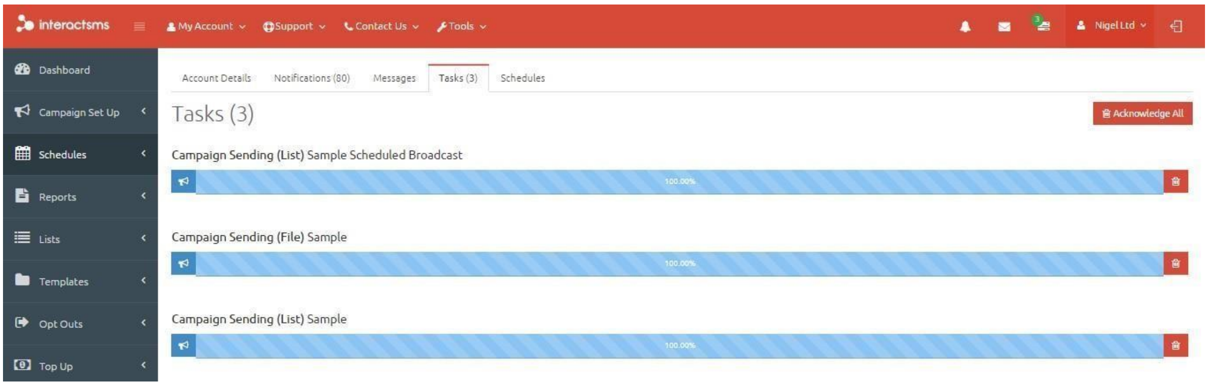

## 12.2 Messages

**Messages** are sent from the Vodafone Bulk Text team to your account, to keep you up to date with any developments to Vodafone Bulk Text, either relating to your account specifically or Vodafone Bulk Text as a whole.

## 12.3 Tasks

The **Tasks** page displays all large campaigns. Once an SMS campaign is over a certain size, it takes a little while to process. While the campaign is processing it can be viewed in the **Tasks** page. The progress of the processing can be viewed on a separate progress bar for each campaign.

Once the task has reached 100%, it will remain in the Tasks page until Acknowledged or deleted. Individual tasks can be deleted by clicking the  (**Delete**) sign beside the task you want to delete. Delete all existing tasks by selecting the **Clear all** button on the top right of the page.



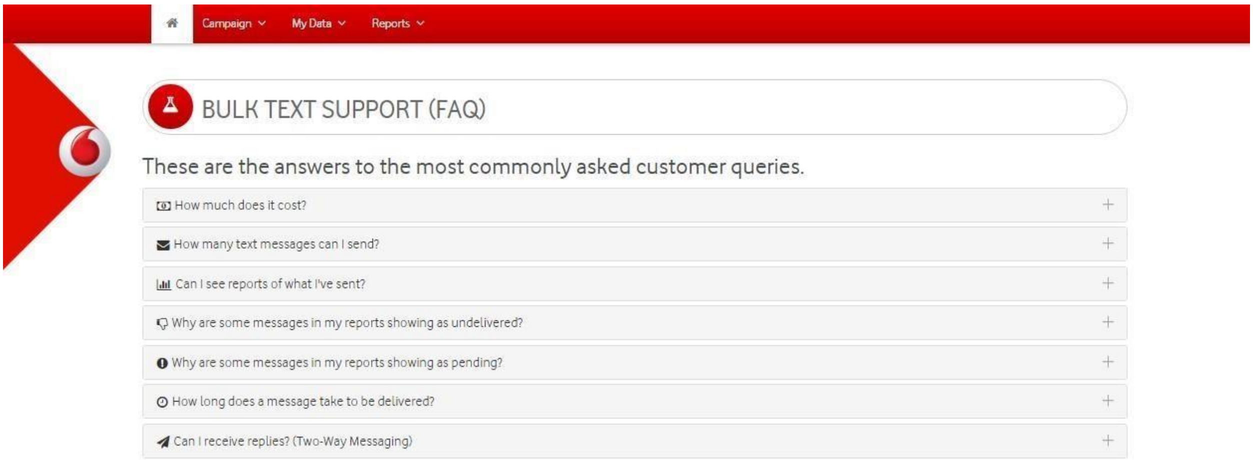

# 13. Support

Located on the top right hand side of the page is the **Support** menu. This provides information on Vodafone Bulk Text.

## 13.1 Frequently Asked Questions (FAQ)

This contains answers to the most frequently asked user queries, regarding Vodafone Bulk Text.

More often than not, if you have a question about using Vodafone Bulk Text, the answer is here.




## 13.2 User guide

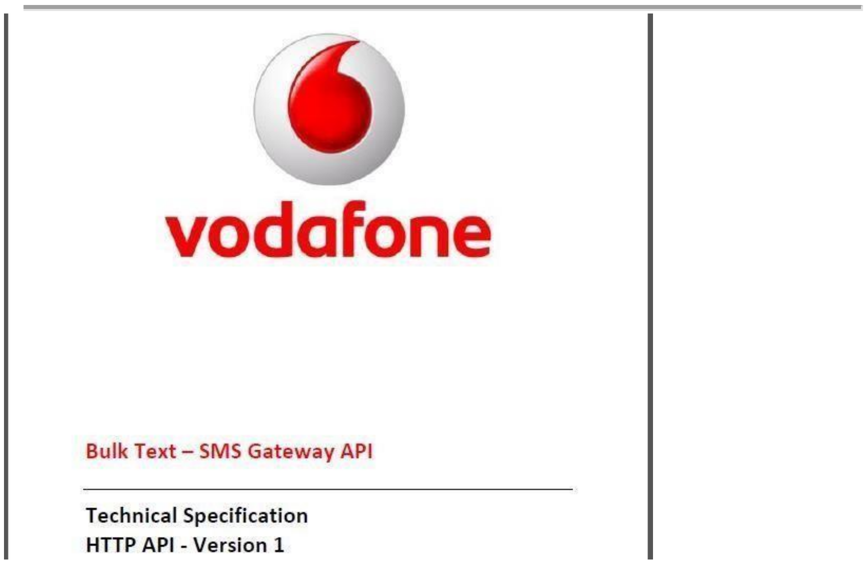
Selecting **User guide** will download a PDF with this user guide. This is the most comprehensive guide to using Vodafone Bulk Text.

## 13.3 SMS gateway API guide

The Vodafone Bulk Text Application Programming Interface (API) product provides an interface between your existing systems and the Vodafone Bulk Text messaging gateway.

Selecting **SMS gateway API guide** will download a PDF with a guide to the Vodafone Bulk Text API.

| | |
|---|---|
| **Note:** | For more information on how using the SMS gateway API can help your business, please contact our sales team on sales@Vodafone Bulk Text.com or call 1907. |




# 14. Contact us

The **Contact us** menu on the top menu bar gives you a number of options to contact different departments of the Vodafone Bulk Text team. There is also a link to the Vodafone Bulk Text **Terms and conditions**.

## 14.1Terms and conditions

The **Terms and conditions** of the Vodafone Bulk Text service are displayed here. These are the rules that you must fully agree to, in order to use the service.

# 15. Tools

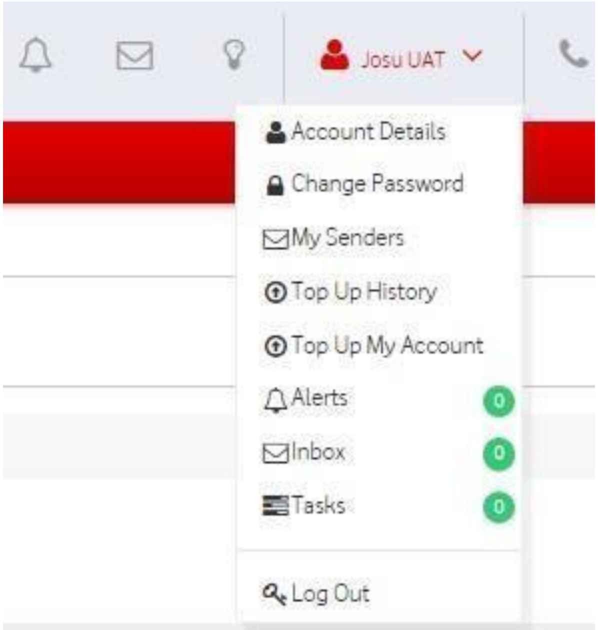
The **Tools** dropdown menu can be accessed from the top right hand side of the page. The menu contains the same options as the top menu bar. The tools options are:

- Dashboard

- Campaign Set Up
- Schedules
- Reports
- Lists
- Templates
- Opt Out Contacts
- Top Up

For information on these, please see the relevant section relating to each.

## 15.1 User account tab




The user account tab is a dropdown menu that can be accessed from the top right hand side of the page by selecting the name of the account displayed. This menu contains all the information relating to your account that is contained in the **Account details** menu and the **Alerts** tabs. The user account tab options are:

- Account Details

- Change My Password
- My Senders
- My Top Up History
- Top Up My Account
- My Notifications
- My Messages
- My Tasks
- Log Out

For information on these, please see the relevant section relating to each.

# 16. Logging Out

Once logged in you can log out of your Vodafone Bulk Text session by selecting the **Log Out** option located on the top right hand side of the page in the **User account tab**.