01 How to Guide

How to send SMS using Messenger

DIRECT LINE communications

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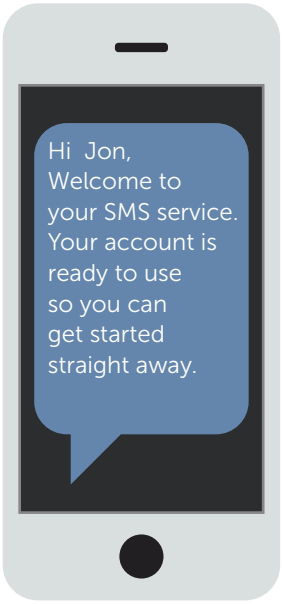
It's simple to stay compliant with **Messenger**
Are you compliant?

Welcome to a better way to engage your customers.



Your **Messenger** account has been credited with ten free text credits so you can get started straight away.

One standard text message can contain up to 160 characters. If you use more than 160 characters in your text, two or more text credits will be used.

Price promise

We continually review the SMS prices on offer to customers, to make sure you benefit from a competitive rate. We only partner with the leading global networks to send texts to UK mobiles, unlike some providers that use cheaper foreign networks. This way, we can guarantee you the best levels of service.

If you find a more competitive quote on a like-for-like service, please call us on **01244 819944** and we promise to at least match it or in most cases beat it.

Your account is ready to use

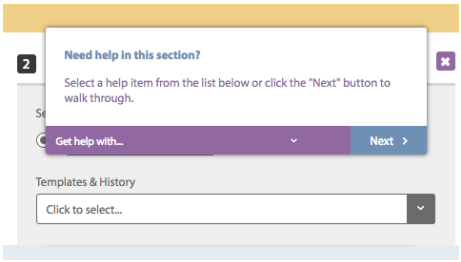
Ready to get started?

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

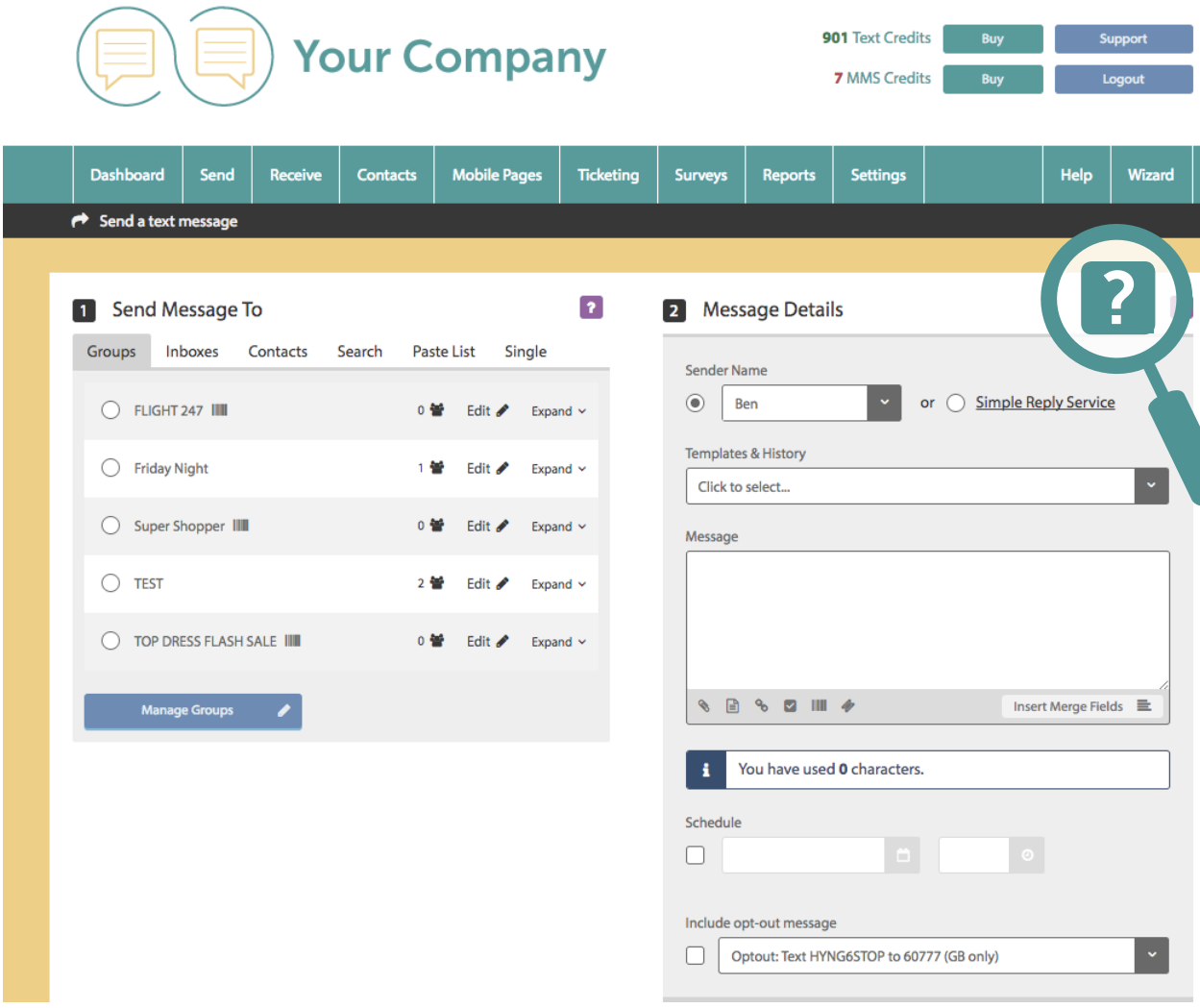
Sending any kind of communication to customers can be daunting, especially if you're sending large volumes. This guide covers everything you need to know about sending SMS with Messenger.

Sending SMS

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



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



5 easy steps to creating your text message

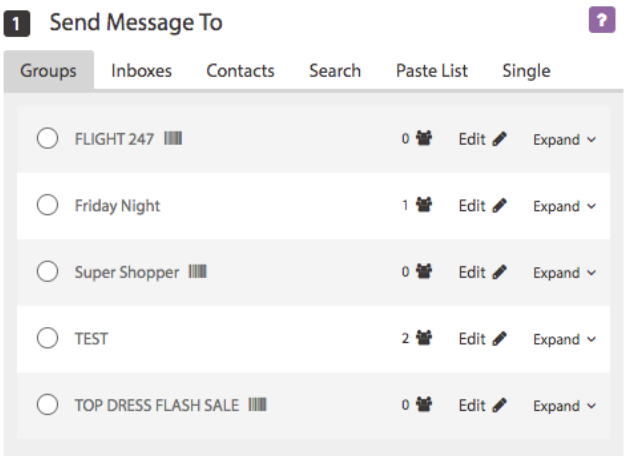
Step 1 – Who are you sending your messages to?

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

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

SMS Tip

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



Step 2 – Creating a sender name

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

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

SMS Tip

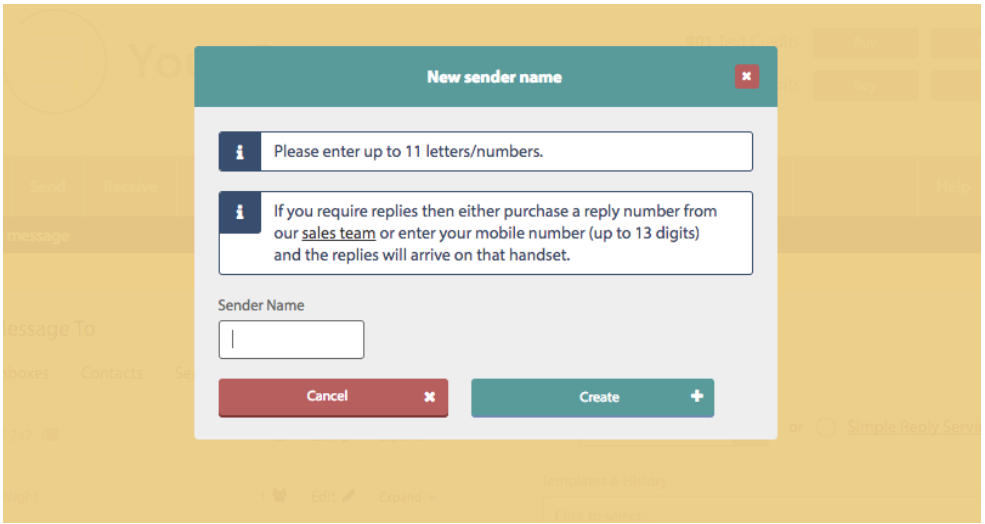
If your company name is longer than 11 characters, try shortening it in a way your customers will recognise.

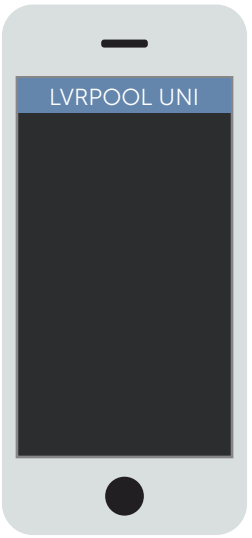
To receive replies, your sender name must be the send number. This can be either of the following:

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

Having an effective sender name

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

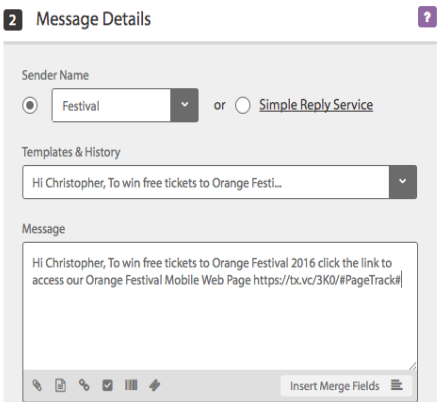




Step 3 – What to say in your message

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

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



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

SMS Tip

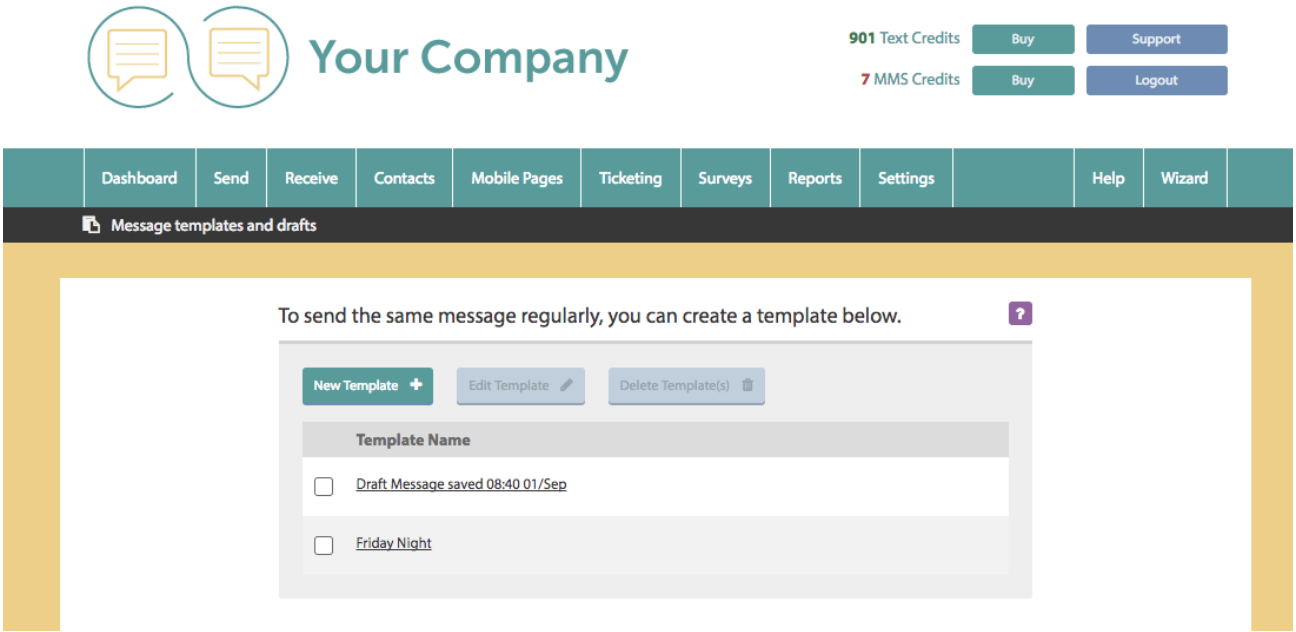
For more professional sounding messages, avoid using text speak!

Step 4 – Templates and history

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

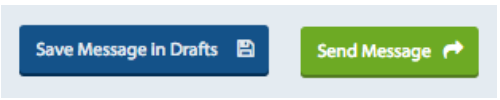
SMS Tip

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



Step 5 – Hitting send

When you are ready to send, a preview of the message you are sending is shown. This allows you to check the message is correct, tells you how many credits each will use and what time it will be sent.



You can use the Scheduling feature to schedule your message at a specific date and time up to 365 days in advance.

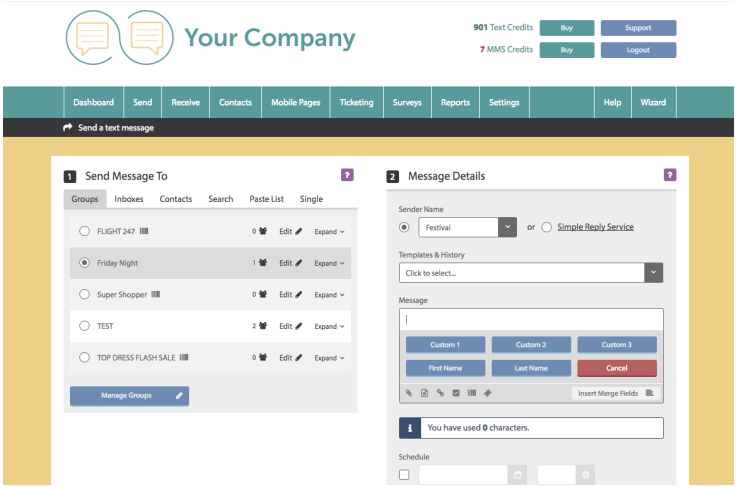
Extra tools to improve your messages

Messenger gives you the ability to personalise your messages.

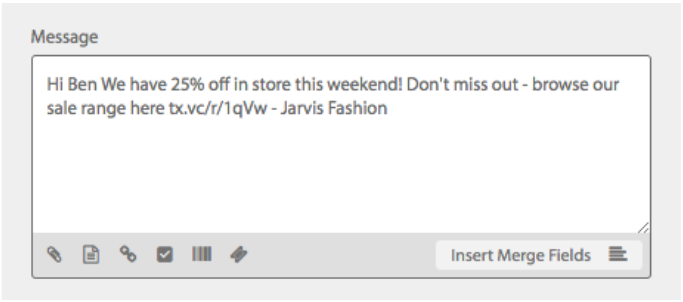
Custom fields

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

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



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



Attachments

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

Page Links

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

Short Links

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

Survey Links

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

Ticket Code

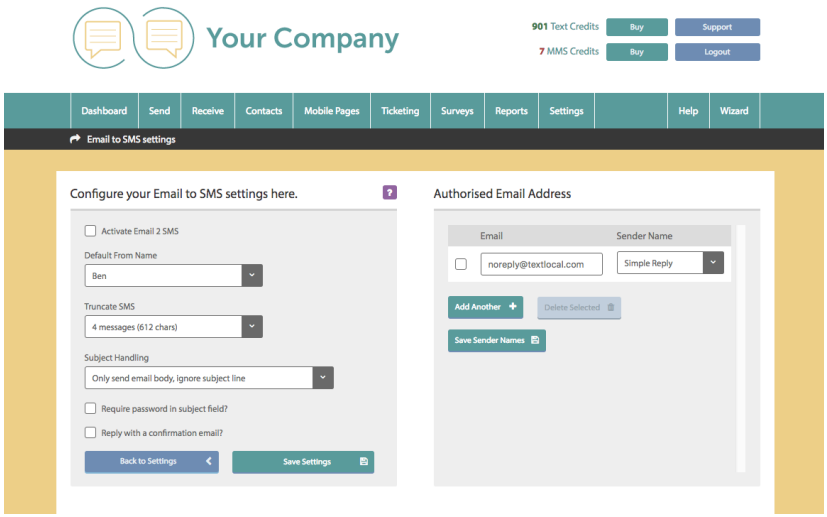
If you're sending out promotional offers, advertising an event or want to create a loyalty scheme, you can use our Mobile Vouchers, Tickets and Loyalty Cards tool. Any tickets you create are given a unique code for redemption.

Ticket Link

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

Email to SMS

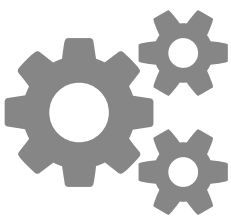
If it's easier for you, send your messages without opening up Messenger just by using your email. It's easy to set up by clicking **'Email to SMS'** within the settings menu in Messenger. Here you can choose email addresses that can send from your account, the length of messages, default send names and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



Reseller Note:
Please contact Textlocal to discuss how to apply your company details to the Email to SMS service.

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

API Gateway



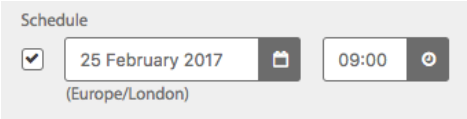
If you want to automate your sends by integrating Messenger with other software that you use for your business, then you can use our free API gateway. We provide a large collection of code documentation for a range of programming languages for free on our website, so it's easy to find the code you need.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

Scheduling and segmenting your messages

Scheduling messages

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

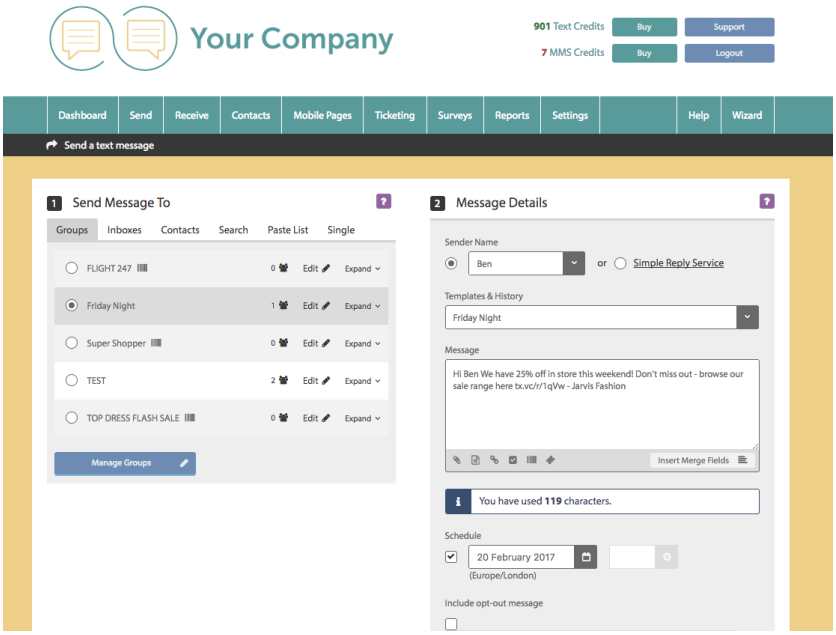
Once you have perfected your sender name, message, custom fields and opt-out, tick the schedule box instead of sending immediately. Select the time and date you want to your messages to be sent. These can be scheduled up to 12 months in advance. You can view and amend all scheduled messages in the reports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



Staggered sends

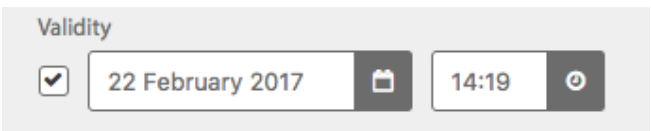
When sending larger volumes of text messages, it's important to think about the impact of the responses you could potentially receive. If you sent 5000 text messages all at once, could you handle the increased volume of inbound calls? This situation can be easily avoided.

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



Validity periods

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



SMS Tip

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

Managing your opt-out's

We strongly advise including an opt-out message on all outbound texts.
Messenger has inbuilt functionality which automatically removes any mobile numbers which have opted-out from your contact list, so you don't have to do anything. This gives peace of mind, knowing that you can't send a message to someone who has opted-out.

By ticking one box, Messenger will add an **'opt-out'** path to your messages. This gives a simple instruction to the recipient on what to do if they would like to remove themselves from your contact list, so they no longer receive any messages from you. The number will stay on the opt-out list until the owner chooses to opt back in.

Messenger will cleanse the contacts you upload, stripping out any numbers which have previously opted-out of your messages. You can also manually add opt-out contact numbers to the list – perfect if a customer contacts you directly with an opt-out request.

Your data is safe with **Direct Line Communications**

We understand how important your contact data is to you and to your business. At Direct Line Communications, we comply in the way we handle all consumer data. We will not pass on any of your data to any third parties, keeping it confidentially, secure and in compliance with the Data Protection Act 1998.
For further information, please view our Privacy Policy on our Website.

Need more help?

If you need any further help or guidance using Messenger please call our dedicated support team on **01244 819944** or visit our website **www.dlc.co.uk** for more help and support.

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