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Author

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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 an InteractSMS 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 InteractSMS shortcode for opt outs is 50123.

**Longcode:** A mobile number presented in the traditional length and style for a specific country, used for SMS responses. The InteractSMS longcode for responses is 00353870602263.

**Post-paid bundle:** The credit bundle purchased is charged to the InteractSMS 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 Text API (Application Programming Interface) product provides an interface between your existing systems and Phonovation Ltd.'s SMS messaging gateway.
For more information on how using the SMS gateway API can help your business, please contact our sales team at sales@interactsms.com or 00353 1 284 3011.

**SMS:** Short Message Service (SMS) is a 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.
1.1 SMS character set handling and multipart messages

This guide gives you information about message length and character set handling of SMS messages. This is an important topic concerning costs. Please read through it to make sure you are able to configure the system according to your preferences.

1.1.1 Introduction

SMS is used to send text messages between mobile phones in most cases. When a text is transmitted, there is a size limitation on the message length. If English characters are used, the maximum message length is 160 characters. When international characters are sent, the maximum length is 70 characters. This size limit is determined by the character set used to transmit the message.

1.1.2 SMS segmentation and reassembly (SAR)

To increase the size limit of text messages, the SMS technology was improved to support longer text messages. This improvement is called as the multipart SMS technology, which refers to a process known as segmentation and reassembly procedure.

If an English text message is longer than 160 characters then, it is first segmented by the sending mobile and is then transmitted through the GSM network in several SMS messages. The recipient mobile phone, after receiving all message parts reassembles the segments and displays the long text as a single message to the user.

If international characters are used the segmentation starts when a message text becomes longer than 70 characters.

When multipart technology is applied, the cost of each message can be calculated by the number SMS messages used to transmit the text over the wireless network. For example, if a text message is 240 English characters it fits into two SMS, so the cost will be twice as much as a single 160 character SMS.

1.1.3 Reduced Message length for Messages over 160 characters:

One might expect that if a single SMS can hold 160 characters, a 320 character message would take two physical SMS Messages. This is not the case, when multipart SMS technology is used only 153 characters fit into a single SMS, because some space is needed for the segmentation information that is used to reassemble the message parts in correct order. So if a 320 character message is sent, it would take 3 SMS. The first two would hold 153 characters, and the last one would hold 14 characters. For international characters, 67 characters fit into a multipart SMS segment.
1.2 Terms and definitions, SAR technology in detail

Character Sets and Unicode:

**English Character Set:**

The English character set refers to the 7 bit SMS alphabet (see Appendix A), that contains English characters and a few international characters for Western Europe and Greece. These characters are defined in the ETSI GSM 03.38 standard.

**International Character Set:**

International characters or Unicode character set. The Unicode character set can be used to send special symbols and characters of all languages including Chinese, Arabic, Hebrew, Cyrillic, special eastern European characters, etc.

In GSM SMS system, an SMS message can contain up to 140 bytes (standard 8-bit bytes) of message data. The 7 bit SMS alphabet (see Appendix A) makes it possible to send 160 characters in these 140 bytes.

This means that, when you send a text message, as long as the text only contains characters that are included in the GSM 7 bit SMS alphabet (see Appendix A) character set, 160 7-bit characters are compressed into 140 8-bit bytes to produce the 160 character limit that we are so familiar with. (Note: 160 * 7 = 140 * 8).

It is worth noting that ETSI GSM 03.38 also defines a few characters that are represented by two 7-bit characters when included in a text message.

Ref: Appendix A: '^', '{', '}', '\', '[', ']', '~' and '€'.

If you want to send a message that contains characters that are not part of the GSM 7-bit character set, such as Chinese, Arabic, Thai, Cyrillic, etc., then the entire text of the SMS that actually goes out over the air needs to be encoded in the Unicode UCS-2 character set. In the UCS-2 character set, each character is encoded with 16-bits (or two 8-bit bytes). This means that an SMS message is limited to 70 16-bit Unicode characters (70 * 16 = 140 * 8).
If a message is larger than 140 8-bit bytes, then segmentation and reassembly standards define, that where a single logical message can be sent over the air using multiple physical SMS messages. The receiving client then has the ability to reassemble the segmented message so that it again appears as a single message on the receiving device.

When a long text message is segmented into multiple physical SMS messages, a special header is added to each physical SMS message so that the receiving client knows that it is a multipart SMS message that must be reassembled by the client. These headers are known as segmentation or concatenation headers or SAR headers. The SAR headers are 6 bytes (8-bits each). They are included in each physical SMS message. These headers are placed in the User Data Header (UDH) field of the message, but they do not count against the overall size limit of the message.

If you send a long text message containing only characters that are part of the GSM 03.38 character set, then each SMS segment can contain up to 153 characters. (140 bytes - 6 bytes for the concatenation header leaves 134 available bytes, or $7 \times 134 = 1072$ bits. The most 7-bit characters that can be packed into 1072 bits is 153.)

If you send a long text message that includes any characters that require Unicode encoding, then each SMS segment can contain up to 67 characters. ($67 \times 16 = 1072$ bits)
2. Support text prompts and videos
Support text prompts and support videos can be accessed through the InteractSMS user interface to explain individual functions.

Support text prompts

Support text prompts (see above image) are available for all fields in the Campaign Set up section. Simply hover the mouse over the field to display the text prompt explaining what is required for that field.

Some popup menus include support text. Wherever the 📋 sign is displayed, hover the mouse over it to display the support text.

Support videos
Support videos are available for certain InteractSMS features. Where a video is available it will be displayed as a link beside the relevant feature. For example, Show me how to use smart tags with a new file.

| Support video available: | A text box like this one will be displayed in each section of this user guide where a support video is available |
3. Registration
To register a new InteractSMS account, visit http://www.interactsms.com/BulkSMS/Register.aspx.

You will be asked to supply the following details:

- **Company:** This is the Company that the new account is to be associated with. (Optional)
- **First Name***: First name of the account holder. (Required)
- **Last Name***: Surname of the account holder. (Required)
- **E-mail***: Email address of the account holder. This email address will also be the account’s **Username**. This will be required (along with the password) in order to **Log in** to the account. (Required)
- **Mobile Number***: The mobile phone number of the account holder. This must be a valid mobile number as it will be used to authenticate the account. (Required)
- **Promotional Code:** If applicable, enter promotional code to take advantage of any InteractSMS promotions. (Optional)
**Captcha:** A test used to tell if you are human. Enter the number/text from the image into the field

* Any field with an asterisk (*) is required and must be filled in to register.

Click the **Continue** button to submit your details.

Once you have supplied the registration information InteractSMS will send you a registration SMS to complete the registration process and validate the mobile number provided.

![InteractSMS registration SMS](https://example.com/registration_sms.png)

The SMS will contain a registration code. Please enter the code into the **Activation Code** field of the **Complete Sign Up** page displayed below.

If you have not received the activation code after a few minutes, click the link on the word **here** underneath the **Activation Code** field.

You will be directed to the **Complete Sign Up** page where you will also be asked to read and confirm acceptance of the InteractSMS terms and conditions. You must agree to these terms and conditions in order to register an account with InteractSMS.
You will also be required to enter a **password**.

**Password**: A combination of characters used to validate you each time you use InteractSMS. Never write down this password or reveal it to anyone who is not authorised to use the account. Passwords must adhere to certain criteria which are listed in the text box below.

**Re-enter password**: The exact same password as above. This is to ensure that you have not made a mistake in your password entry.

<table>
<thead>
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<th>Passwords must:</th>
<th></th>
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<tr>
<td>- Contain at least 7 characters</td>
<td></td>
</tr>
<tr>
<td>- Contain at least one letter</td>
<td></td>
</tr>
<tr>
<td>- Contain at least one number</td>
<td></td>
</tr>
<tr>
<td>- Contain at least one special character (e.g. @,!,/)</td>
<td></td>
</tr>
</tbody>
</table>

Select the **Activate Free Account** button.

Your account is activated! You will now be redirected to the InteractSMS **Campaign Set Up** page.
Step 1. Who Do You Want To Send To?

- Send to a New File
- Send to One Mobile Number
- Send to a Send List

Options:
- Save my file as application
- Use message list spreadsheet
- Use other options
4. Logging in

Registered users can log into the InteractSMS application by going to the following URL:

http://www.interactsms.com/BulkSMS/login.aspx

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 to gain full access to the main site.
5. 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.

![Login Page](image)

- You will be redirected to the **Forgot your password?** screen.
- If you know your login name (username) you can enter it here along with the mobile number that was supplied during registration.
• Once the correct details have been entered, select the **Send SMS** button.

• An SMS containing a reset password will be sent to your mobile phone.

Here is your new password for **www.interactsms.com**: p8H6RsCf

• The password can then be reset to a password of your choosing through the **Change My Password** screen, please see section on **Change Password**.

**The main site is made up of three sections**

1. The left navigational panel.

2. The top menu bar.

3. The central area where details and input forms are displayed.
6. Dashboard

The Dashboard provides an overview of your account and InteractSMS activity.

Select the dashboard from the left navigation panel. Once selected, the following will be displayed:

**New Campaign:** Select this to send a new SMS campaign. Please see section on [Campaign Set Up](#).

**Remaining Credits/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](#).

**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](#).

**Reports:** Select this to visit the [Reports](#) section where you can perform in-depth analysis of your InteractSMS activity. Please see section on [Reports](#).

**Messages in the last 30 days:** This graph displays how many messages were sent from your InteractSMS in the last 30 days. This report can be viewed in more detail in the [Reports](#) section.
Message status the in last 30 days: This graph displays how many messages were Sent, Pending, Delivered and Undelivered in the last 30 days. For explanations of these terms, please see the section on Reports.

Campaigns Report: This table displays information on your previous campaigns. For more information on this report, please see the section on Reports.
7. Campaign Set Up

To send a campaign, select **Campaign Set Up** from the left navigation panel.

There are three options when sending a campaign: **Send to a New File**, **Send to one mobile number** and **Send to a 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.

7.1 **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
set up menu on the left navigation panel. 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. Who do you want to send to?
- Step 2. Who do you want to send it from?
- Step 3. What would you like to say?
- Step 4. When would you like to send it?

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

7.1.1 Step 1. Who do you want to send to?
You will be required to enter the following information relating to whom the campaign will be broadcast to:

7.1.1.1 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.

Note: Files must be saved in Microsoft Excel© format (xls. or xlsx).
Basic files will contain only the mobile numbers of contacts in the first column.

Support video available: Show me how to format a new file

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.

7.1.1.2 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.

7.1.1.3 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 text, 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. What would you like to say?

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

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

7.1.1.4 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. When Would You Like To Send It?

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

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>353850000001</td>
<td></td>
<td>01/02/2015 17:00</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>353850000002</td>
<td></td>
<td>02/02/2015 17:30</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>353850000003</td>
<td></td>
<td>12/02/2015 10:00</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>447700000004</td>
<td></td>
<td>12/02/2015 13:00</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>447700000005</td>
<td></td>
<td>15/02/2015 14:30</td>
<td></td>
</tr>
</tbody>
</table>

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

7.1.1.5 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.

![Image of spreadsheet]

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

![Image of Format Cells popup box]

• 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.

![Image of Excel format dialog box]

7.1.1.6 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.

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.

7.1.1.7 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 text messages for the same mobile number, it will not count as a duplicate and the contact will receive both messages.

7.1.2 Step 2. Who do you want to send it from?
You will be required to enter the following information relating to whom the campaign will be broadcast from:
7.1.2.1 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’.

7.1.2.2 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.

7.1.2.3 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 ‘InteractSMS’. When this lands on a recipient’s handset they can easily identify that InteractSMS has sent them a message.
7.1.2.4 Set up your own sender name

Select **Set up your own sender name** under the **Sender name** field to display the below popup.

Enter your name in the field provided. Enter your 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. InteractSMS 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.

**7.1.3 Step 3. What would you like to say?**
Step 3 deals with the actual message that is to be sent to the recipient.

**7.1.3.1 Choose from templates**
If a text 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 text 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.

### 7.1.3.1 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.

#### Choose From Templates

<table>
<thead>
<tr>
<th>Message Text</th>
<th>Characters left: 290</th>
<th>Messages: 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hi John Smith, your appointment is scheduled for 19/11/2014 at 10:00. To reschedule please call 012345678. For directions, please visit our website at <a href="http://www.appointment.com">www.appointment.com</a>. Text STOP to 50123</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### 7.1.3.2 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 text characters. Special characters (for example, €, £, $) may use more than one character space.
For more information on Message Length and Special Characters, please see http://www.interactsms.com/BulkSMS/Documents/Interactsms/specialcharacter_info.pdf

7.1.3.1 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 with a new file

An example of a message with smart tags is below.

The blue squares filled with text (e.g. NAME) 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 your Microsoft Excel® file with relevant information in the columns after column A. Column A must always contain the mobile numbers.

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

- 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. The image below shows when a second smart tag for Column 3 (C) has been added, **SURNAME**.

• 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).

7.1.3.1 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 text message content. Please see section on Templates for more information on managing templates.

7.1.4 Step 4. When would you like to send it?

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

7.1.4.1 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.

7.1.4.2 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 InteractSMS 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.

7.1.3.1 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; 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.

### 7.1.3.2 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.
7.2 Send to one mobile number

Support video available:  Show me how to 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 set up menu on the left navigation panel, 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. Who do you want to send to?
- Step 2. Who do you want to send it from?
- Step 3. What would you like to say?
- Step 4. When would you like to send it?

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

7.2.1 Who do you want to send to?

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 ( ) - + ' ~.

7.2.2 Step 2. Who Do You Want To Send It From?
You will be required to enter the following information relating to who the campaign will be broadcast from:

7.2.2.1 Campaign name
This is a name given by the user 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 different broadcasts. For Example, ‘May Discount Campaign’.

7.2.2.2 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.

7.2.1.1 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 ‘InteractSMS’. When this lands on a recipient’s handset they can easily identify that ‘InteractSMS’ has sent them a message.

![Image of sender name setup](image)

7.2.1.2 Set up your own sender name

Select **Set up your own sender name** under the **Sender name** field to display the below popup.

Enter your name in the field provided. Enter your email address in the field provided. Enter the name of the sender name (or sender names) that you would like to request in the field provided.

![Image of set up your own sender name](image)
All sender names must be screened manually by Phonovation before they can be used. InteractSMS 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**.

**7.2.3 Step 3. What would you like to say?**

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

**7.2.3.1 Choose from templates**

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

Select **Choose from templates** 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 message sent to one mobile number, if it contains **Smart tags**. Please see section on **Smart tags**.

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

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

7.2.3.3 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 text characters. Special characters (for example, €, £, $) may use more than one character space.

For more information on Message Length and Special Characters, please see http://www.interactsms.com/BulkSMS/Documents/Interactsms/specialcharacter_info.pdf

7.2.3.4 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 text message content. Please see section on Templates for more information on managing templates.

7.2.3 Step 4. When would you like to send it?
There are two options that can be selected in Step 4, Send Now or Send Later.

7.2.3.1 Send Now
To send the message at the current time and date, select the Send Now button. The message will begin to be broadcast to the recipient’s handset straight away.
7.2.3.2 Send Later

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

Options to enter a future date will be displayed. You will be required to select the date and time for the message campaign from these options. The message will then be stored by the InteractSMS 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 a campaign has begun to send it cannot be cancelled.

7.2.3.1 Confirm Campaign

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

This will display the **Number of contacts; Messages to send; 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 message 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 with the campaign. You will then be redirected to dashboard where the results of your broadcast can be viewed.

### 7.3 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 InteractSMS application. Lists can contain all customer information from a CRM. Lists can also be created and edited in the **Lists** page on the left navigation panel. 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 Set Up** menu. 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. Who do you want to send to?
- Step 2. Who do you want to send it from?
- Step 3. What would you like to say?
- Step 4. When would you like to send it?

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

### 7.3.1 Who do you want to send to?

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

#### 7.3.1.1 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 Text 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**.
7.3.1.2 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.

7.3.1.3 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 text 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.

![Select Value](Image)

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

![Select Value](Image)

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 text or a number into the text 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**, the below **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 with the range option selected, the below Select Value fields are displayed.

![Select Value](image)

**Date range**

**Number range**

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 as below.

![Add Filter](image)

Multiple filters can be applied by following the exact same process. All the selected filters will then
be displayed as below.

Filters can be removed by selecting the **X** 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).

**7.3.1.1 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 text.
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).

### 7.3.2 Step 2. Who do you want to send it from?

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

#### 7.3.2.1 Campaign name

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

#### 7.3.2.2 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.

7.3.2.3 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 ‘InteractSMS’; when this lands on a recipient’s handset they can easily identify that InteractSMS has sent them a message.

7.3.2.4 Set up your own sender name

Select Set up your own sender name under the Sender name field to display the below popup. 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. InteractSMS 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.

**7.3.3 Step 3. What would you like to say?**

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

**7.3.3.1 Choose from templates**

If a text 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 text 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.

![Choose Message Template](image)

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](#).

![Not available](image)

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.

![Message Template Overview](image)

### 7.3.3.2 Message Text

The Message text field will contain the body or content of the message that will be sent in the campaign.
7.3.3.3 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 text characters. Special characters (for example, €, £, $) may use more than one of the characters allowed.

For more information on Message Length and Special Characters, please see [http://www.interactsms.com/BulkSMS/Documents/Interactsms/specialcharacter_info.pdf](http://www.interactsms.com/BulkSMS/Documents/Interactsms/specialcharacter_info.pdf)

7.3.3.4 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.
7.3.3.5 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 text message content. Please see section on Templates for more information on managing templates.

7.3.4 Step 4. When would you like to send it?

There are three options that can be selected in Step 4, Send Now, Send Later or Schedule Broadcast.

7.3.4.1 Show summary

This option, if selected, will provide the campaign summary confirmation popup upon selecting Send Now, Send Later or Schedule Broadcast.

Your campaign will begin to send earlier if this option is not checked and you do not avail of the opportunity to confirm the summary information. For information on the summary, please see the section Confirm Campaign.

7.3.4.2 Send Now

To send the message campaign at the current time and date, select the Send Now button. The messages will begin to broadcast straight away.

7.3.4.3 Send Later

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

**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.
Options to enter a future date 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 InteractSMS 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 a campaign has started to send then the broadcast cannot be cancelled.

**7.3.4.4 Schedule Broadcast**

Campaigns sent from a saved list can be scheduled to automatically send at selected times, to be repeated indefinitely.

To schedule a broadcast, first select **Schedule Broadcast**. From the dropdown menu labelled **Schedule Broadcast Every**, select how often you would like to send the broadcast. Every hour, day, week etc.

Next you will be prompted to enter what specific times you would like to send at. For example, if you have selected to send a broadcast every month, dropdown menus will appear to select the date each month that you would like to send on. A dropdown menu will also appear to enter the exact time of day the broadcast is to be sent on your chosen date every month.
Once the scheduled broadcast is confirmed, it can be viewed in the Schedules page by selecting Schedules on the left navigation bar.

**Note:** Scheduled broadcast will run indefinitely until cancelled. To delete a broadcast, please see the section on Schedules.

### 7.3.4.5 Confirm Campaign (Small Campaigns)

After you have selected either Send now or Send later for a campaign to 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; Send date, Message content and any Filters applied.

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

### 7.3.4.6 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.
8. Schedules

From the left navigation panel you can select Schedules to open the schedules section. This page displays all active broadcasts that are scheduled to send at regular intervals. To see how to send scheduled broadcasts, please see the section on Scheduled broadcasts in the Send to a saved list section.

Scheduled broadcasts can be scheduled to send every minute, hour, day, week, month or year. The details of all active scheduled broadcasts can be viewed here, as displayed above.

The details listed are the schedule’s name, scheduling times and the next individual broadcast date and time.

Cancelling Scheduled Broadcasts

Once broadcasts are scheduled, they can be cancelled from the Schedules page. On the right hand side of the schedule that you would like to cancel/delete, click the Cancel button. The schedule is now cancelled. In order to start a new schedule, you will need to start the scheduling process again. Please see section on Send to a saved list.
9. Reports

From the left navigation panel you can select Reports to open the reports section. This page shows the reports that you can use to monitor all your InteractSMS activity. The reports contained in this section are: Campaigns Report, Messages Report, Opt Outs Report, Credits Report, Top Ups 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.

<table>
<thead>
<tr>
<th>Report sequence</th>
</tr>
</thead>
<tbody>
<tr>
<td>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 <strong>Campaign name</strong> the results will be ordered in alphabetical or reverse alphabetical order.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Search</th>
</tr>
</thead>
<tbody>
<tr>
<td>A <strong>Search field</strong> is located on the top right hand side of each report. This can be used to search for individual entries within a report.</td>
</tr>
</tbody>
</table>

**9.1 Campaigns report**
This report details all the campaigns that have been sent from your InteractSMS 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.

### 9.2 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.
9.3 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 InteractSMS and those that have opted out via SMS. For more information please see the section on Opt outs.

9.4 Credits report
This report details the breakdown of credits used for each message campaign during the reporting dates that you have selected.

The first graphic displays what proportion of the messages sent, used what number of credits. If all messages sent only used one credit each, then this graphic will be entirely one colour.
The second graphic displays the different monetary values charged for your messages (including VAT) and in what proportions.

The third graphic displays what countries the messages were sent to.

9.5 Top ups report
This report details the Top ups made to an SMS account and on what dates. Top up information is listed by its monetary value. Please see the section on Top Ups.
9.6 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 Set Up.

9.7 Mobile Report (Mobile websites/Vouchers/Geolocations)

This report can be viewed in the Mobile Websites page. Select the Activity button below the mobile
website that you would like to see the report of. Please see the section on [Mobile website activity / analytics].
10. 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 left navigation panel 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.

10.1 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.

10.2 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.

10.2.1 New List Name
This will be the name that the list will be saved as.

10.2.2 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.
10.2.3 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.

10.2.4 Select an Excel® file (or Text 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.

10.2.4.1 Microsoft Excel® file format (.xls and .xlsx):

Support video available: Show me how to format a saved list

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.

![Excel file example]

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**

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>353850000001</td>
<td>Nigel</td>
<td>19/08/1959</td>
<td>Red</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>353850000002</td>
<td>John</td>
<td>20/08/1963</td>
<td>White</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>353850000003</td>
<td>Sarah</td>
<td>21/08/1978</td>
<td>Red</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>447700000004</td>
<td>Mark</td>
<td>22/08/1981</td>
<td>Red</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>447700000005</td>
<td>Jane</td>
<td>23/08/1975</td>
<td>White</td>
<td></td>
</tr>
</tbody>
</table>

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**.

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Mobile</td>
<td>Name</td>
<td>Date of Birth</td>
<td>Wine Preference</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>353850000001</td>
<td>Nigel</td>
<td>19/08/1959</td>
<td>Red</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>353850000002</td>
<td>John</td>
<td>20/08/1963</td>
<td>White</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>353850000003</td>
<td>Sarah</td>
<td>21/08/1978</td>
<td>Red</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>447700000004</td>
<td>Mark</td>
<td>22/08/1981</td>
<td>Red</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>447700000005</td>
<td>Jane</td>
<td>23/08/1975</td>
<td>White</td>
<td></td>
</tr>
</tbody>
</table>

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**.
**10.2.4.2 Text file format (.txt):**

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

Plain text 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 be automatically removed from list entries.

10.2.5 **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 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.

10.2.6 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 text 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 text box and selecting Remove number.
10.2.7 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.

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 Text 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.

### Add Columns

**Primary List**

- **Sample List**

- **Create a new list with the added information**
- **Append columns to the existing list**

**New List Name**

- **Sample**

Select an Excel file from your computer.

![Select file and Upload button](image)

**MY NUMBER.xlsx (10.32 KB)**

<table>
<thead>
<tr>
<th>Column</th>
<th>Value found</th>
<th>Column Name</th>
<th>Column Type</th>
<th>Mapped?</th>
<th>Mapped Column</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>353805074577</td>
<td></td>
<td>Select Type</td>
<td>☐</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Nigel</td>
<td></td>
<td>Select Type</td>
<td>☐</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td>Select Type</td>
<td>☐</td>
<td></td>
</tr>
</tbody>
</table>

**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?**

If you check a 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. At least one of the uploaded file columns must be mapped onto a column from the original list.

**Mapped column**

If 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.
10.2.8  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.
11. Templates

Saving a message as a template allows you to reuse text 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 left navigation panel menu by selecting the Templates button.

11.1 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.

![Add Smart Tag popup](image)

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.

11.2 Delete - Templates
To remove a template, select the Delete button on the far right hand side of the template to be removed.
12. Opt outs

| Important: | All bulk SMS campaigns must contain an Opt out option at the end of each message.

For InteractSMS clients sending SMS to Republic of Ireland mobile phones the opt out should be written as one of the following:

“Text STOP to 50123”

“Text OPTOUT to 50123”

“Text OPT OUT to 50123”

The recipient then has the option to send one of those keywords (STOP, OPTOUT OR OPT OUT) to 50123 (free of charge) if they no longer wish to receive any messages from your InteractSMS account.

The recipients will then automatically be added to your Opt out list and will no longer be able to receive SMS from your account.

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.

12.1 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 text box above for more information on Opt outs.

12.2 View opt outs
To view all opt out contacts you can either step through each of the pages 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.

### 12.3 Add a new contact to opt outs list

Contacts can be added to the opt outs list in the **Opt Outs** page. 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 00353861111111.

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

### 12.4 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.

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.
13. Top Ups

If you have a pre-paid account you will need to add credit to your account to send messages. If you are a post-paid client you will be required to contact your InteractSMS account manager to purchase an SMS bundle.

**Note:** For information on setting up a post-paid account, please contact our sales team on sales@interactsms.com or 00353 1 284 3011.

### 13.1 Pre-paid top up

To top up your pre-paid account, select **Top ups** from the left navigation panel. You can select the amount you wish to top up by and then select **Proceed to payment** to continue to the confirmation screen; please see below.

You will be shown a summary of the amount the top up will cost and the number of credits that will be purchased. If these details are correct, click **Confirm and pay** to be redirected to the **Realex secure payment page**, where you will be asked to enter your credit card details to complete the payment.
14. Mobile Websites

Mobile websites are websites specifically designed for mobile devices. Using the InteractSMS interface you can easily create one in just a few minutes by simply dragging and dropping the features you would like into the Mobile Website. A link to the mobile website can be included in the message text in your SMS campaigns.

The performance of each mobile website can be viewed in the InteractSMS interface.

Support video available: Show me mobile websites

Mobile websites can also include Vouchers and Geolocations.

Mobile websites can be created for any event, special or any other purpose that your require them for.

14.1 Create a new mobile website

Note: If you would like InteractSMS to build a Mobile Website for you, please contact sales on 00353 (0) 1 2843011 or sales@interactsms.com

Select the + New Mobile Website button from the top left of the Mobile Websites section.

The below popup will be displayed. Enter the name of your New Mobile Website. This will not be sent, it is just for your own reference. Select Save.
You will be taken to the below page.

From this page mobile websites can be created from the menu options on the left of the phone by dragging and dropping the desired features into the mobile phone.

**Drag & drop process**

- Hover the mouse over the feature that you would like to include in the mobile website.
- Press and hold the mouse and drag it over to where you would like to include it in the phone diagram.
- When you hover over an area that displays **DROP HERE** release the mouse to include the feature in the mobile website.
Edit mobile website features

Hover the mouse over the feature in the phone graphic. 2 icons will appear, select the pencil icon to edit that feature.

Each feature will have a slightly different editing process. Those that are not immediately obvious will have instructions included. Please see the example of the video editing popup below.

Support video available: Show me how to embed a YouTube video in a mobile website

Delete mobile website features

Hover the mouse over the feature in the phone graphic. 2 icons will appear, select the bin icon to delete that feature.
Save mobile websites

There is no need to save mobile websites. They are automatically saved. When you return to the Mobile Websites section you will find the website that you were working on.

14.2 Clone a mobile website

Mobile websites can be cloned if you would like to create a mobile website that is only slightly different from an existing mobile website that you have created.

In the Mobile Websites section select the Clone Existing Website button on the top left of the page. Select the website that you would like to clone from the dropdown menu. The below popup menu will ask you to give your new website a name.

Select Save.

You can now edit the mobile website design using the exact same method as for a brand new mobile website.

The existing mobile website that it was cloned from will remain saved and independent of this new website.

14.3 Edit or delete a mobile website

To edit an existing mobile website, choose the website that you would like to edit from the Mobile Websites page. Below the website, select the Edit button. This will take you to the mobile website and you can edit it using the same process that is used to create it.

To delete a mobile website, select the Delete button below the mobile website that you would like to delete.
14.4 Sending an SMS campaign with mobile websites

To send an SMS campaign containing a link to a custom built mobile websites, the same process is followed as sending any other SMS campaign up until Step 3) What do you want to say. Please see the section on Campaign Set Up.

On the right of the message text box, select the mobile website that you would like to embed in the SMS campaign. Once selected, it can be previewed by selecting the eye (اظهار) symbol.

Click the +Add button to add a link to the mobile website in the message text.

When the campaign is sent, the message will appear as below on the recipient’s handset.
14.5 Mobile website activity / analytics

Select the Activity button below the mobile website to view its report.

The below report page will be displayed.

Select report campaign

Any mobile website can be used for multiple campaigns. The report is automatically set to view all the SMS campaigns sent with that mobile website. To narrow the report to display results for a specific campaign or campaigns, select the dropdown menu on the top left hand side of the page.

Note: The number of credits charged for the use of the mobile website links will be displayed in the confirmation popup before the campaign is sent.
From this dropdown menu you can select your desired campaign or campaigns.

Select the **Search** button next to this menu to apply the report to the selected campaign(s).

**Select report dates**

Mobile website reports are set to the last 7 days of activity by default. To change this timeframe, select the dropdown dates field on the top left of the page.

From the menu, select your desired reporting period. To view a custom range: select **Custom Range**, select the beginning and end dates in the **FROM** and **TO** fields, click the **Apply** button and then click the **Search** button.

The three boxes on this page display:

- **Sent** – The number of SMS messages sent containing the mobile website link
- **Clicked** – The number of those recipients who clicked on the link to the website
- **Page views** – The number of website pages that have been viewed by recipients
There are 5 detailed reports available for mobile websites:

**Views**

This graph displays how many people viewed the SMS with the mobile website link compared to how many of them actually clicked on it.

**Devices**

These 4 graphs display the breakdown of:

- The mobile browsers used to view the website
- The versions of the mobile browsers used to view the website
- The operating systems used to view the website
- The operating system versions used to view the website
Map

Note: The Map report can only be viewed if geolocations are included in the microsite. Please see the section on Stores / Geolocations.

This report displays a map containing all of the locations where recipients clicked on the link to the mobile website. It also contains your store location(s). To see how to add store locations to your InteractSMS account, please see the section on Stores / Geolocations.

Closest Stores

Note: The Closest Stores report can only be viewed if geolocations are included in the microsite and your store locations are entered into your InteractSMS account. Please see the section on Stores / Geolocations.

This bar chart contains your stores which recipients were closest to when they clicked on the link to the mobile website.

Voucher Stats

Note: The Voucher Stats report can only be viewed if vouchers are included in the microsite. Please see the section on Vouchers.

The Voucher Stats graph displays:

- **Sent** - The number of SMS containing links to mobile sites with Vouchers sent
- **Displayed** - The number of those mobile site links clicked on
- **Redeemed** - The number of those vouchers for which customers pressed the redeem button. In order for this to be displayed, the redeem button must be included in the mobile voucher.
15. Stores / Geolocations

When geolocations are contained in a mobile website they allow customers to see exactly where your premises are in relation to their location. It also allows you to view where customers were when they viewed your website. To view the reporting of geolocations please see the sections on the Map Report and the Closest Stores Report.

15.1 Stores

The physical locations of your store or stores must be added to your InteractSMS account. To add these, select the Stores option from the left navigation bar.

Viewing your stores
From the Stores page you can view all of your existing stores.

To view a store on a map select the Locate button beside it. Stores can also be edited or deleted by selecting the Edit or Delete buttons beside each location.

15.1.1 Adding new stores

New stores can either be added one at a time or multiple stores at a time by uploading a list.

Add a single store
Select the **Add new store** button. The below popup will be displayed.

Enter the following information:

- **Store ID.** This is a number or code that you give this store in order to identify it (e.g. 0001)
- **Store Name**
- **Latitude and Longitude**

To find your store location coordinates from Google Maps, please follow these simple steps:

- Open Google Maps
- Right-click the place or area on the map
- Select **What’s here?** From the dropdown menu
- Under the search box, an info card with coordinates will appear
- Copy and paste the latitude and longitude into InteractSMS

Support video available:  
[Show me how to get coordinates](#)

To view the location on a map, select the **Check Location** button.
You can include additional information regarding your location that will appear on the geolocations tab in the mobile website. Enter this information into the Contact information and Address information fields.

Select Save. The new location is now added to your list of locations.

Upload multiple stores

A list of stores can be uploaded in a Microsoft Excel file with the following exact column order: UNIQUE ID, STORE NAME, ADDRESS 1, ADDRESS 2, CITY, COUNTY/STATE, TWO LETTER ISO COUNTRY CODE, POSTAL CODE, PHONE, EMAIL, OPENING HOURS, LATITUDE and LONGITUDE.

UNIQUE ID and STORE NAME are mandatory values. All other columns are optional.

If there is already a store in the system with the same UNIQUE ID the data of that store will be updated with values in the file.

Below is an example of a correctly formatted Microsoft Excel file:

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
<th>L</th>
<th>M</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>STORE 1</td>
<td>Address Line 1</td>
<td>Address Line 2</td>
<td>City 1</td>
<td>County 1</td>
<td>IE</td>
<td>+353 1 123 1234</td>
<td><a href="mailto:email@phonovation.com">email@phonovation.com</a></td>
<td>Monday: 9:00-17:00</td>
<td>53.38958</td>
<td>-6.13096</td>
</tr>
<tr>
<td>2</td>
<td>2</td>
<td>STORE 2</td>
<td>Address Line 2</td>
<td>Address Line 3</td>
<td>City 2</td>
<td>County 2</td>
<td>IE</td>
<td>+353 1 123 1235</td>
<td><a href="mailto:email@phonovation.com">email@phonovation.com</a></td>
<td>Monday: 9:00-17:01</td>
<td>53.38958</td>
<td>-6.13096</td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td>STORE 3</td>
<td>Address Line 3</td>
<td>Address Line 4</td>
<td>City 3</td>
<td>County 3</td>
<td>IE</td>
<td>+353 1 123 1236</td>
<td><a href="mailto:email@phonovation.com">email@phonovation.com</a></td>
<td>Monday: 9:00-17:02</td>
<td>53.38958</td>
<td>-6.13096</td>
</tr>
</tbody>
</table>

Download a sample Microsoft Excel file here.

Select the Upload stores list button.

Select the Microsoft Excel file from your computer.

When it has been uploaded, select Confirm to add the new stores to your list of premises.
15.2 Add geolocations to a mobile website

In the mobile website editor (please see the section on Mobile Websites) select the HEADER menu. From this, drag and drop the Store Geolocation option into any point in the mobile website.

The geolocations map is now included in the mobile websites along with any additional information that was entered regarding the location. The customer can now view their location relative to your stores on the map.

Edit the geolocations tab
Hover the mouse over the geolocations tab and select the pencil icon that appears. The popup menu below will allow you to include text above the map and the option to include: Display buttons, Display address and Display opening hours.

15.3 View customers geolocations

If geolocations have been added to a mobile website sent in an SMS campaign you can view the locations of customers when they viewed the website. This can be viewed in the Activity report in the Mobile websites page. Please see the section on Mobile Website Activity / Analytics.
16. Vouchers

Vouchers can be included in mobile websites with voucher codes unique to each customer. The vouchers can be redeemed in store for any special offer and the results can be measured.

Support video available: Show me Vouchers

To view all of your existing voucher sets, select **Vouchers** from the left navigation bar. From this page you can view how many vouchers have been sent, how many have been viewed, how many have been redeemed and how many are still available.

16.1 Create or upload voucher codes

Select the **+Add new voucher set** button at the top left-hand side of the **Vouchers** page. The below popup will be displayed.
Enter a name to reference your vouchers (for example “June Sale Vouchers”).

**Upload codes**

If you already have voucher codes from your POS system or generated from another source, they can be uploaded here and used in InteractSMS mobile websites. The codes can simply be **alphanumeric**. They can also be the numeric codes of **bar codes** or the alphanumeric codes of **QR codes**.

Select **Upload codes** and click the **Upload voucher list** button.

Select **Save**.

![New Vouchers Set](image)

**Auto-generate codes**

You can also create voucher codes instantly.

Select **Auto-generate codes**.

Enter the number of codes that you would like to generate.

Select the **code type** from the dropdown menu. There are 3 options:

- QR Codes
- Bar Codes
- Alphanumeric Codes

Select **Save**.

### 16.2 Add vouchers to a mobile website

In the mobile website editor (please see the section on **Mobile Websites**) select the **HEADER** menu.

From this, drag and drop the **Vouchers** option into any point in the mobile website.
The voucher is now included in the mobile website. You will see a QR code as the default voucher code displayed. To include specific codes and further information you will need to edit the voucher tab.

**Edit the voucher tab**

Hover the mouse over the voucher tab and select the pencil icon that appears.

In the popup you can enter the promotions **Heading** and **Content** as well as an optional **Icon** for the tab.
Here again is the option to auto-generate codes by selecting **Random generate**. From the **Code type** field you can either select: **QR Codes**, **Bar Codes** or **Alphanumeric Codes**. Selecting to randomly generate voucher codes at this stage is slightly different to generating them in the main **Vouchers** page. In the Edit Voucher tab you are not asked to select a number of voucher codes to generate. Instead a new unique code is generated for each voucher that is viewed in a mobile site by a customer. The voucher set will then appear in the main **Vouchers** page as **Random Stock** – [WEBSITE NAME].

To use voucher codes that have previously been auto-generated or uploaded, select **From stock**. To see how to upload vouchers or create them in the **Vouchers** page, please see the section on **Create or upload voucher codes**.

Select the voucher set to use from the **Stock** dropdown menu.

The **Show Redeem Button?** option allows customers to press this button in front of a store attendant to prove that the voucher has been redeemed at that point. After this point the customer’s voucher will be displayed as Redeemed. This button also allows the redemption to be recorded in the **Activity** report of the mobile website. Please see the section on **Mobile Website Activity / Analytics**.

Select **Save changes**. The vouchers are now included in the mobile website. Each recipient of an SMS containing a voucher will receive a unique code.

### 16.3 Sending a mobile website containing vouchers

When sending an SMS campaign containing a link to a mobile website with vouchers, the below popup will be displayed for you to confirm the campaign. To see how to send a campaign containing a mobile website, please see the section on **Sending an SMS campaign with mobile websites**.
In this case **Voucher Restrictions** are added to the confirmation page. These allow you to change restrictions for each campaign without going back into the microsite.

**Valid From / Valid To**
In the event that a mobile website is used multiple times, this field allows you to edit the dates during which the vouchers are valid. Simply select the **To** and **From** dates and times from the menu.

If you have set date restrictions for the vouchers in your mobile website they will appear here and are editable. If no dates are selected the vouchers will be valid indefinitely.

**Selected Stores**
If you have uploaded stores in the **Stores** page you also have the option to change the store location or locations at which the vouchers are valid.

If no store is selected then the vouchers will be valid in all of your locations.
17. Mobile Lookup

Mobile Lookup allows you to search your InteractSMS account for mobile numbers that you have used previously.

The number can search four different areas of InteractSMS. You can choose to search any combination of these or all four categories.

The four search areas are:

**Search Campaigns:** Any number that you have sent in a campaign before. This will show the information about previous sends within the date range you enter.

**Search Replies:** Any number that has replied to any InteractSMS campaign you have sent. This will show the information about previous replies within the date range you enter.

**Search Lists:** Any number included in any of your saved lists.

**Search Optouts:** Any number included in your optout list. You can delete numbers from your optout list here by selecting Delete beside the number.
18. My account

Located on the top menu bar is the My account 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.

18.1 Account Details

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

### 18.2 Change my password

Change Password

If you wish to change your password, select Change My Password on the My Account menu in the top menu bar. The Change your password Screen is displayed.

You will be asked to supply your old password and insert a new password. You need to confirm the
new password by entering it a second time. Select Change password for the changes to take effect.

**Passwords must:**
- Contain at least 7 characters
- Contain at least one letter
- Contain at least one number
- Contain at least one special character (e.g. @,!,/)

**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?

**18.3 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 My Account 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.

**18.4 Top up history**

To view the history of previous top ups, select the Top up history button under the My account menu on the top menu bar.

This will display amounts and dates of previous account top ups. Each of these top up records can be selected and printed out, as a record of payments made.

**18.5 Top up my account**

To top up the credits in your account, click the Top up my account button at the bottom of the Account details page.

For more information on topping up, please see the section on Top ups.

**19. Notifications, Messages and Tasks**

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

These alerts are located on the right hand side of the top menu bar. 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 My account page. Select any of the My account options from the dropdown list on the top menu bar. You can then select the Notifications, Messages and Alerts tabs on the right of the Account details tab.

19.1 Notifications

Notifications are sent to your InteractSMS 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.

19.2 Messages

Messages are sent from the InteractSMS team to your account, to keep you up to date with any developments to InteractSMS, either relating to your account specifically or InteractSMS as a whole.
14.3 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 Acknowledge all button on the top right of the page.
20. Support
Located on the top menu bar is the **Support** menu. This provides information on InteractSMS.

![Support Menu](image)

20.1 Frequently Asked Questions (FAQ)
This contains answers to the most frequently asked user queries, regarding InteractSMS. More often than not, if you have a question about using InteractSMS, the answer is here.

![FAQ Page](image)

20.2 User guide
Selecting **User guide** will download a PDF with this user guide. This is the most comprehensive guide to using InteractSMS.

20.3 SMS gateway API guide
The InteractSMS Application Programming Interface (API) product provides an interface between your existing systems and the InteractSMS messaging gateway.

Selecting **SMS gateway API guide** will download a PDF with a guide to the InteractSMS API.

**Note:** For more information on how using the SMS gateway API can help your business, please contact our sales team on sales@interactsms.com or 00353 1 284 3011.
21. **Contact us**

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

![Contact us menu](image)

### 21.1 Email sales

The **Email sales** option allows you to contact the InteractSMS sales department by email.

**Sales:** [sales@interactsms.com](mailto:sales@interactsms.com)

![Email sales form](image)

### 21.2 Contact support

The **Contact us** menu allows you to contact the InteractSMS support team. The following form will be displayed when the **Contact support** option is selected:
Alternatively you can email the support team directly on the following email address:

Support: interactsms.support@phonovation.com

**Note:** The operations team endeavours to respond to all support tickets as soon as possible.

### 21.3 Terms and conditions

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

The **Tools** dropdown menu can be accessed from the top menu bar. The menu contains the same options as the left navigation panel. 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.

22.1 **User account tab**
The user account tab is a dropdown menu that can be accessed from the top menu bar. This menu contains all the information relating to your account that is contained in the My account 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.

**23. Logging Out**

Once logged in you can log out of your InteractSMS session by selecting the **Logout** button located on the right hand side of the top menu bar. You can also log out by clicking **Log out** at the user account tab menu.
If you did not find the information you were looking for in this user guide or you have any comments or suggestions, please contact us at: interactsms.support@phonovation.com
### Appendix A - The 7 bit default alphabet of GSM phones

This table gives you information about the GSM 7 bit alphabet used in text SMS messages. To see how you can send special symbols and international characters, please read the following document:

Your PC and your GSM phone use two different character sets: the ISO-8859-1 and the GSM 7 bit alphabet.

This is the 7 bit default alphabet as specified by GSM 03.38. The corresponding ISO-8859-1 decimal codes are shown in the rightmost column. Note that the euro sign (€) is included in the ISO-8859-15 character set.

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