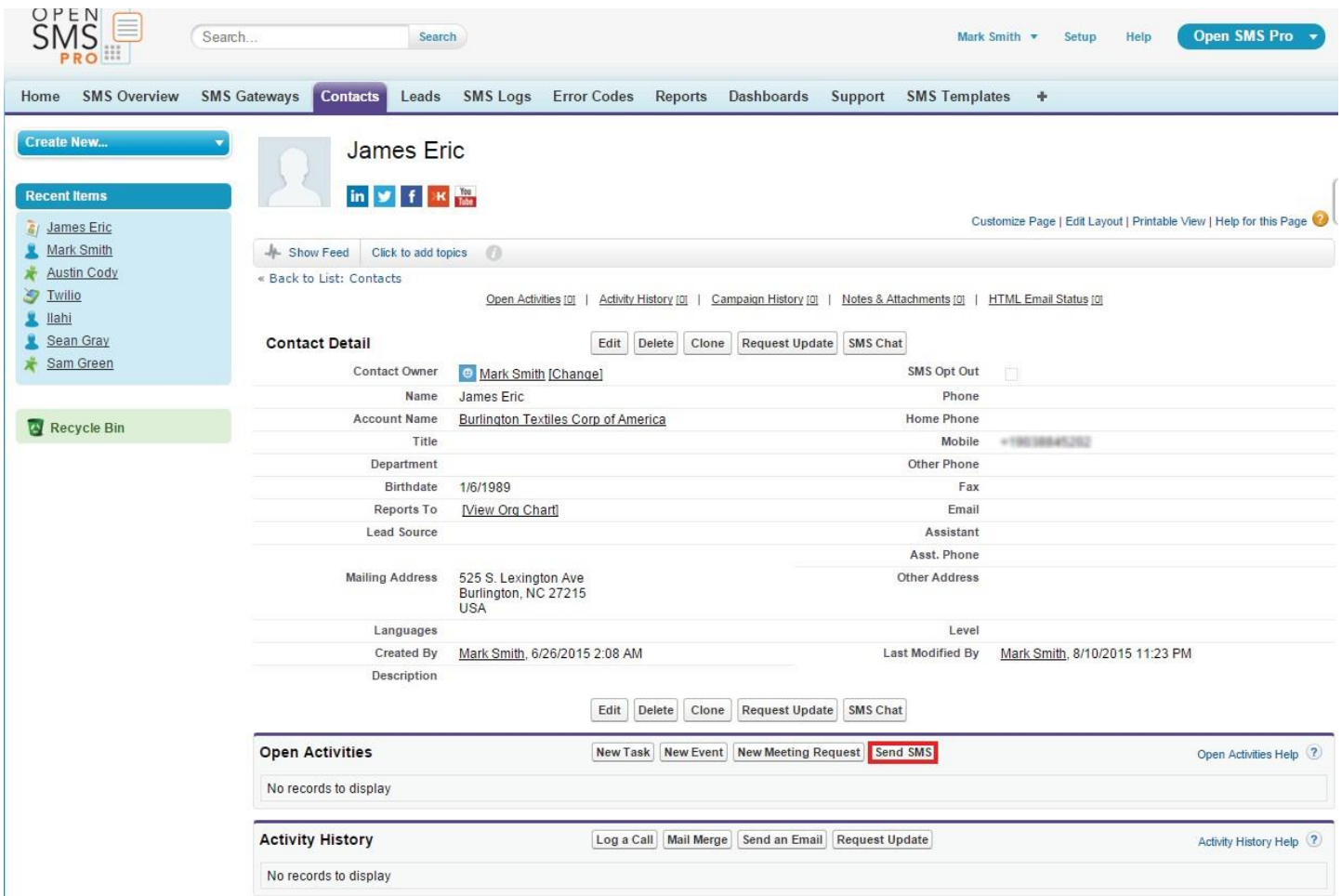


USER GUIDE FOR OPEN SMS PRO



How to send a single SMS to Contacts

- Select the 'Open SMS' application from the Salesforce application drop-down list. To test whether the Open SMS app is functioning properly, send a test message to a contact.
- Click on the 'Contacts' tab where you can choose a single contact and send a message by clicking on the 'Send SMS' button in the 'Open Activities' section.



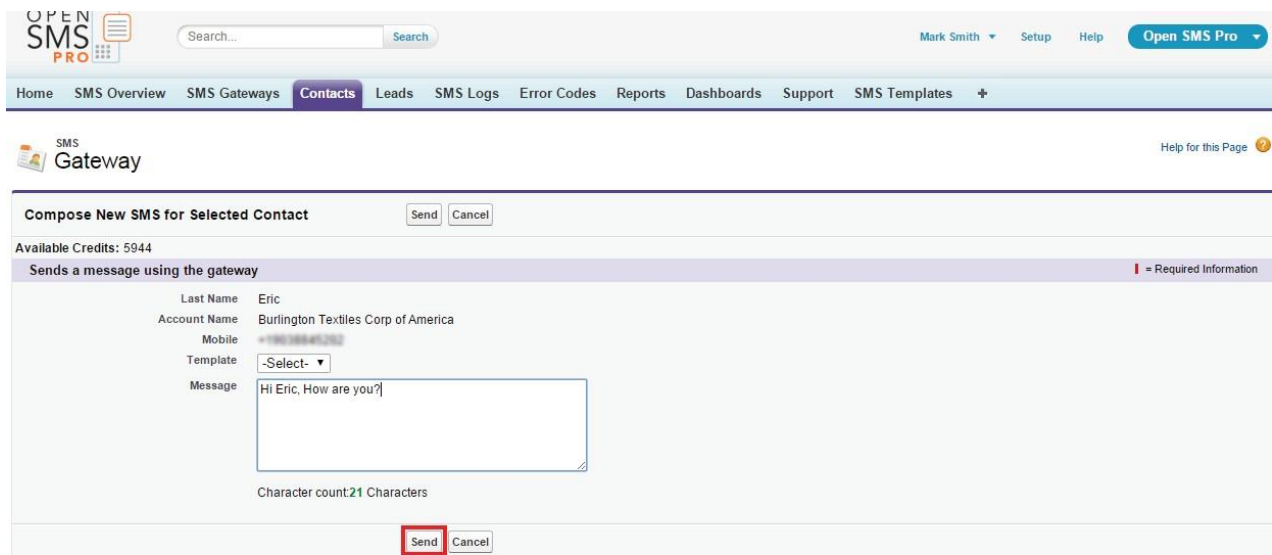
The screenshot displays the Open SMS Pro interface within a Salesforce-like environment. The top navigation bar includes a search bar, user profile (Mark Smith), and a dropdown menu for 'Open SMS Pro'. The main navigation tabs are Home, SMS Overview, SMS Gateways, **Contacts**, Leads, SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates. On the left sidebar, there is a 'Create New...' button, a 'Recent Items' list (including James Eric, Mark Smith, Austin Cody, Twilio, Itahi, Sean Gray, and Sam Green), and a 'Recycle Bin' button.

The main content area shows the contact details for **James Eric**. The 'Contact Detail' section includes fields for Contact Owner (Mark Smith), Name (James Eric), Account Name (Burlington Textiles Corp of America), Title, Department, Birthdate (1/6/1989), Reports To (View Org Chart), Lead Source, Mailing Address (525 S. Lexington Ave, Burlington, NC 27215 USA), Languages, Level, Created By (Mark Smith, 6/26/2015 2:08 AM), and Last Modified By (Mark Smith, 8/10/2015 11:23 PM). Action buttons (Edit, Delete, Clone, Request Update, SMS Chat) are available for the contact.

Below the contact details, the 'Open Activities' section is visible, featuring buttons for 'New Task', 'New Event', 'New Meeting Request', and **Send SMS** (highlighted with a red box). Below this, the 'Activity History' section shows 'No records to display'.

USER GUIDE FOR OPEN SMS PRO

c) To send a message to the selected contact, type a message in the message box as shown below. Click on the 'Send' button.



OPEN SMS PRO

Search... Search

Mark Smith Setup Help Open SMS Pro

Home SMS Overview SMS Gateways **Contacts** Leads SMS Logs Error Codes Reports Dashboards Support SMS Templates +

SMS Gateway Help for this Page

Compose New SMS for Selected Contact Send Cancel

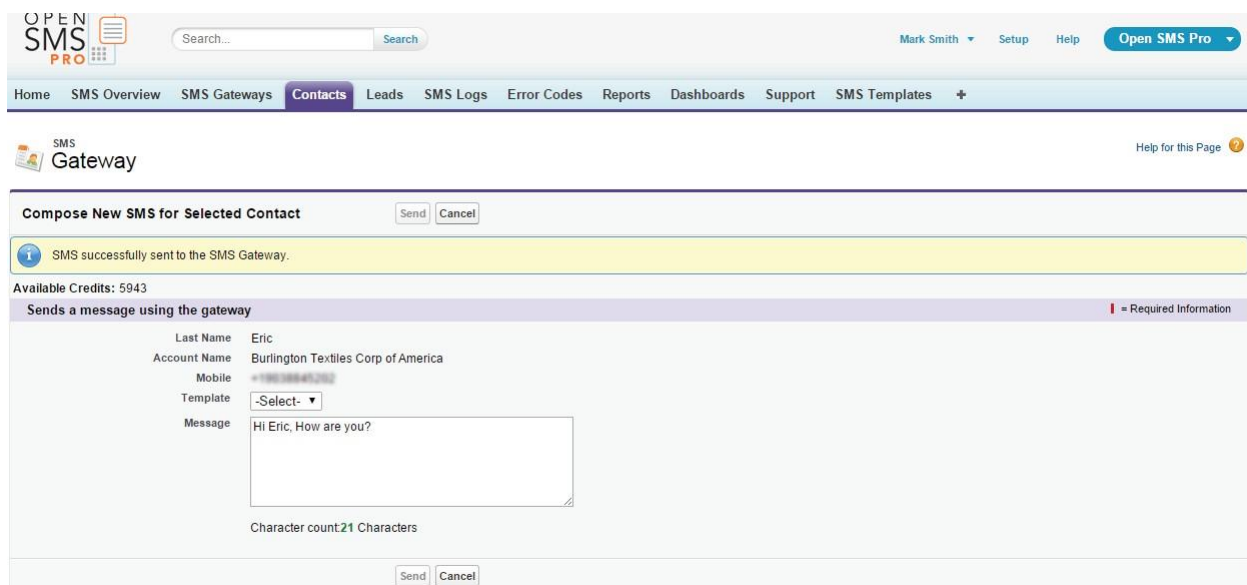
Available Credits: 5944

Sends a message using the gateway ! = Required Information

Last Name: Eric
 Account Name: Burlington Textiles Corp of America
 Mobile: +19038847292
 Template: -Select-
 Message: Hi Eric, How are you?
 Character count: 21 Characters

Send Cancel

d) If the test message is delivered, the user gets a notification 'SMS successfully sent to the SMS Gateway.'



OPEN SMS PRO

Search... Search

Mark Smith Setup Help Open SMS Pro

Home SMS Overview SMS Gateways **Contacts** Leads SMS Logs Error Codes Reports Dashboards Support SMS Templates +

SMS Gateway Help for this Page

Compose New SMS for Selected Contact Send Cancel

SMS successfully sent to the SMS Gateway.

Available Credits: 5943

Sends a message using the gateway ! = Required Information

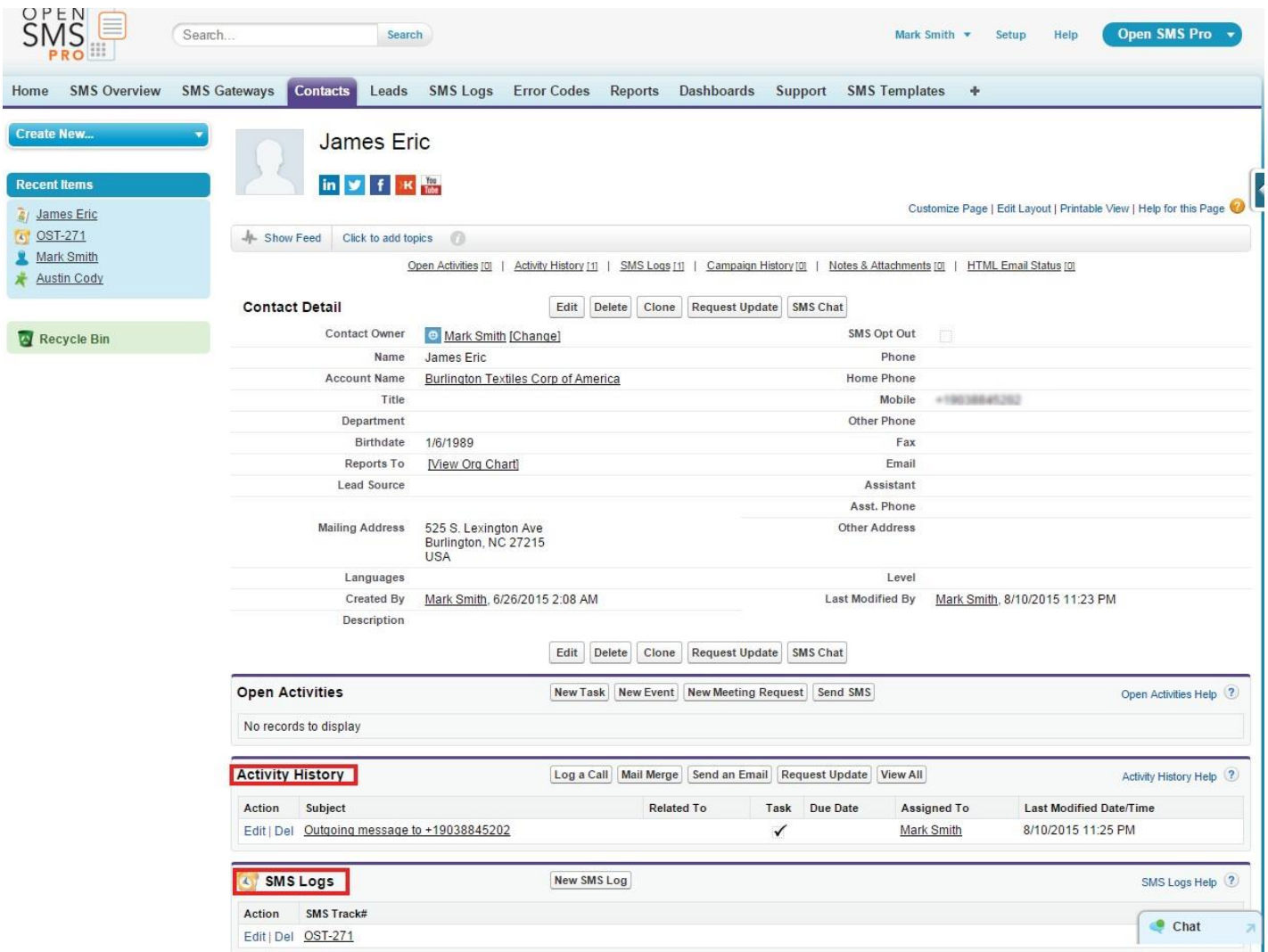
Last Name: Eric
 Account Name: Burlington Textiles Corp of America
 Mobile: +19038847292
 Template: -Select-
 Message: Hi Eric, How are you?
 Character count: 21 Characters

Send Cancel

USER GUIDE FOR OPEN SMS PRO



e) Once the message is delivered, the user can check the record history of the delivered message in the 'Activity History' section which shows the contents of the message. The 'SMS Logs' section shows records of the status of the message delivered and the contact number it was delivered to.



The screenshot displays the Open SMS Pro web application interface. The top navigation bar includes a search bar, user profile (Mark Smith), and links for Setup, Help, and Open SMS Pro. The main navigation menu lists various sections: Home, SMS Overview, SMS Gateways, Contacts, Leads, SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates.

The 'Contacts' section is active, showing the profile for 'James Eric'. The profile includes a 'Recent Items' list on the left and a 'Contact Detail' section on the right. The 'Contact Detail' section contains fields for Contact Owner, Name, Account Name, Title, Department, Birthdate, Reports To, Lead Source, Mailing Address, Languages, Created By, and Description. It also includes buttons for Edit, Delete, Clone, Request Update, and SMS Chat.

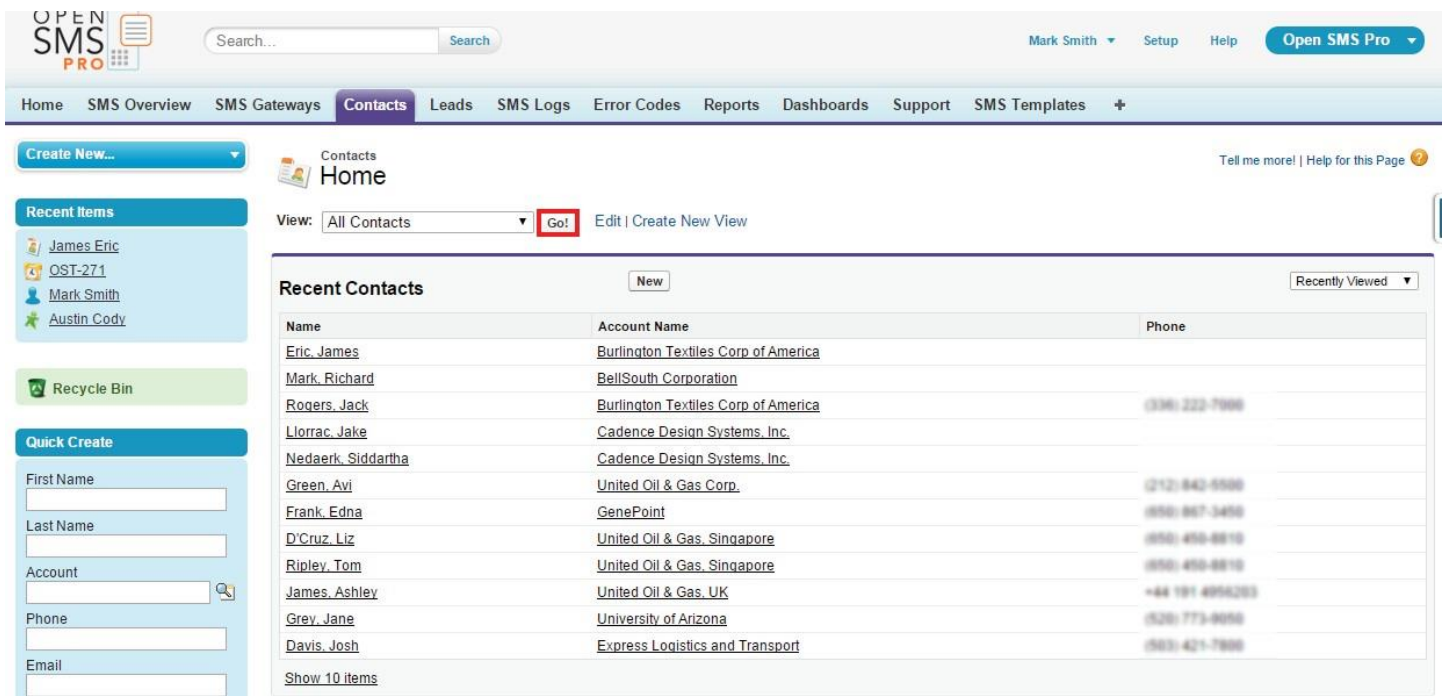
Below the contact details, there are three sections: 'Open Activities', 'Activity History', and 'SMS Logs'. The 'Activity History' section is highlighted with a red box and contains a table with columns for Action, Subject, Related To, Task, Due Date, Assigned To, and Last Modified Date/Time. The 'SMS Logs' section is also highlighted with a red box and contains a table with columns for Action and SMS Track#.

Action	Subject	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Outgoing message to +19038845202		✓		Mark Smith	8/10/2015 11:25 PM

Action	SMS Track#
Edit Del	OST-271

How to send Bulk SMS to Contacts

a) Click on the 'Contacts' tab and then click on the 'Go!' button, this will take you to the screen where all the Contacts are listed.

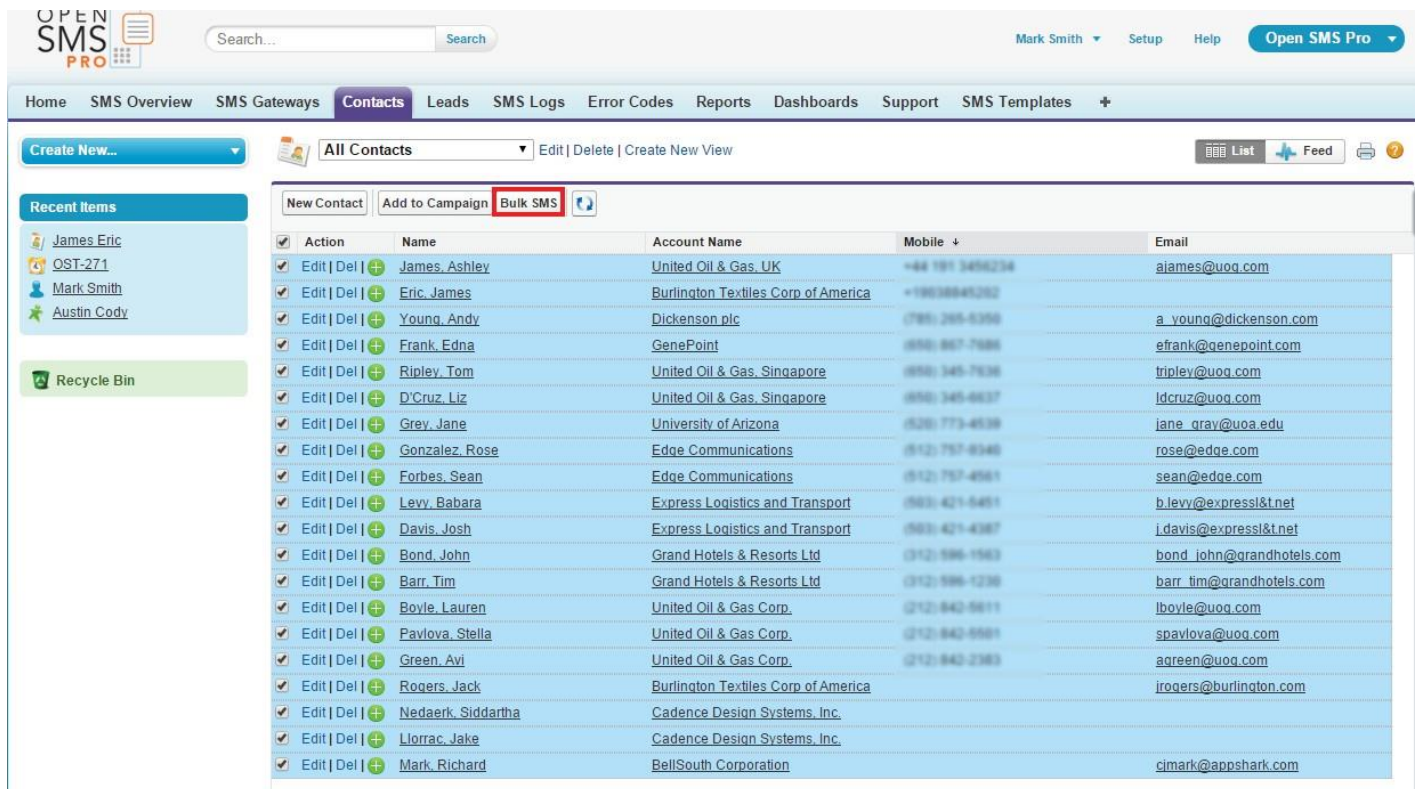


The screenshot shows the Open SMS Pro web interface. The top navigation bar includes a search bar, user profile (Mark Smith), and links for Setup, Help, and Open SMS Pro. The main navigation bar has tabs for Home, SMS Overview, SMS Gateways, **Contacts**, Leads, SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates. On the left sidebar, there are sections for 'Create New...', 'Recent Items' (listing James Eric, QST-271, Mark Smith, and Austin Cody), 'Recycle Bin', and 'Quick Create' (with fields for First Name, Last Name, Account, Phone, and Email). The main content area is titled 'Contacts Home' and shows a 'View: All Contacts' dropdown with a red box around the 'Go!' button. Below this is a table of 'Recent Contacts' with columns for Name, Account Name, and Phone. The table lists 10 contacts, including Eric James, Mark Richard, Rogers Jack, Llorac Jake, Nedaerk Siddhartha, Green Avi, Frank Edna, D'Cruz Liz, Ripley Tom, and James Ashley. A 'Show 10 items' link is at the bottom of the table.

Name	Account Name	Phone
Eric James	Burlington Textiles Corp of America	
Mark Richard	BellSouth Corporation	
Rogers Jack	Burlington Textiles Corp of America	(336) 222-7988
Llorac Jake	Cadence Design Systems, Inc.	
Nedaerk Siddhartha	Cadence Design Systems, Inc.	
Green Avi	United Oil & Gas Corp.	(212) 842-5588
Frank Edna	GenePoint	(850) 867-3450
D'Cruz Liz	United Oil & Gas, Singapore	(650) 450-8810
Ripley Tom	United Oil & Gas, Singapore	(650) 450-8810
James Ashley	United Oil & Gas, UK	+44 191 4956283
Grey Jane	University of Arizona	(520) 773-8050
Davis Josh	Express Logistics and Transport	(562) 421-7888

USER GUIDE FOR OPEN SMS PRO

- b) Select the Contacts to whom you intend to send the SMS. Then click on 'Bulk SMS' button to proceed.



The screenshot shows the OPEN SMS PRO web interface. The 'Contacts' tab is selected, and the 'All Contacts' view is active. The 'Bulk SMS' button is highlighted in the top right of the contact list area. The contact list table is as follows:

Action	Name	Account Name	Mobile	Email
☒ Edit Del +	James_Ashley	United Oil & Gas, UK	+44 191 3456234	ajames@uoq.com
☒ Edit Del +	Eric_James	Burlington Textiles Corp of America	+19038845262	
☒ Edit Del +	Young_Andy	Dickenson plc	(780) 265-6356	a_young@dickenson.com
☒ Edit Del +	Frank_Edna	GenePoint	(850) 867-7686	efrank@genepoint.com
☒ Edit Del +	Ripley_Tom	United Oil & Gas, Singapore	(650) 345-7636	triplev@uoq.com
☒ Edit Del +	D'Cruz_Liz	United Oil & Gas, Singapore	(650) 345-6637	ldcruz@uoq.com
☒ Edit Del +	Grey_Jane	University of Arizona	(602) 773-4536	jane_gray@uoa.edu
☒ Edit Del +	Gonzalez_Rose	Edge Communications	(512) 757-6340	rose@edge.com
☒ Edit Del +	Forbes_Sean	Edge Communications	(512) 757-4561	sean@edge.com
☒ Edit Del +	Levy_Babara	Express Logistics and Transport	(803) 421-6461	b.levy@expressl&t.net
☒ Edit Del +	Davis_Josh	Express Logistics and Transport	(803) 421-4367	j.davis@expressl&t.net
☒ Edit Del +	Bond_John	Grand Hotels & Resorts Ltd	(312) 596-1563	bond_john@grandhotels.com
☒ Edit Del +	Barr_Tim	Grand Hotels & Resorts Ltd	(312) 596-1236	barr_tim@grandhotels.com
☒ Edit Del +	Boyle_Lauren	United Oil & Gas Corp.	(212) 842-5611	lboyle@uoq.com
☒ Edit Del +	Pavlova_Stella	United Oil & Gas Corp.	(212) 842-5581	spavlova@uoq.com
☒ Edit Del +	Green_Avi	United Oil & Gas Corp.	(212) 842-2363	agreen@uoq.com
☒ Edit Del +	Rogers_Jack	Burlington Textiles Corp of America		jrogers@burlington.com
☒ Edit Del +	Nedaerik_Siddhartha	Cadence Design Systems, Inc.		
☒ Edit Del +	Llorac_Jake	Cadence Design Systems, Inc.		
☒ Edit Del +	Mark_Richard	BellSouth Corporation		cimark@appshark.com

USER GUIDE FOR OPEN SMS PRO



c) As shown in the screen below, the user is provided with a preview of the selections made. The user can make edits by going back to the 'Selected Contacts' page. The user can type the message in the message box and then click on the 'Send' button.



Mark Smith ▾
Setup
Help
Open SMS Pro ▾

Home
SMS Overview
SMS Gateways
Contacts
Leads
SMS Logs
Error Codes
Reports
Dashboards
Support
SMS Templates
+


Bulk SMS
Selected Contacts
Help for this Page ?

[Back to List Contact Items](#)

Sending Bulk SMS, Summary Reports can be viewed on the Home Page if there are no errors in sending the Bulk SMS

Selected Contacts
Summary Report

Contacts Selected

Send a message via SMS to one or more recipients using the Bulk messaging feature of your SMS Gateway. The message will be sent to all recipients listed below.

Tim Barr	Grand Hotels & Resorts Ltd	(312) 586-1230
John Bond	Grand Hotels & Resorts Ltd	(312) 586-1563
Josh Davis	Express Logistics and Transport	(503) 421-4367
Babara Levy	Express Logistics and Transport	(503) 421-5451
Sean Forbes	Edge Communications	(512) 757-4561
Rose Gonzalez	Edge Communications	(512) 757-6340
Jane Grey	University of Arizona	(520) 773-4539
Liz D'Cruz	United Oil & Gas, Singapore	(650) 345-6637
Tom Ripley	United Oil & Gas, Singapore	(650) 345-7636
Edna Frank	GenePoint	(650) 947-7686
Andy Young	Dickenson plc	(785) 265-5350
James Eric	Burlington Textiles Corp of America	+19038845202
Ashley James	United Oil & Gas, UK	+44 191 3456234

Template
-Select- ▾

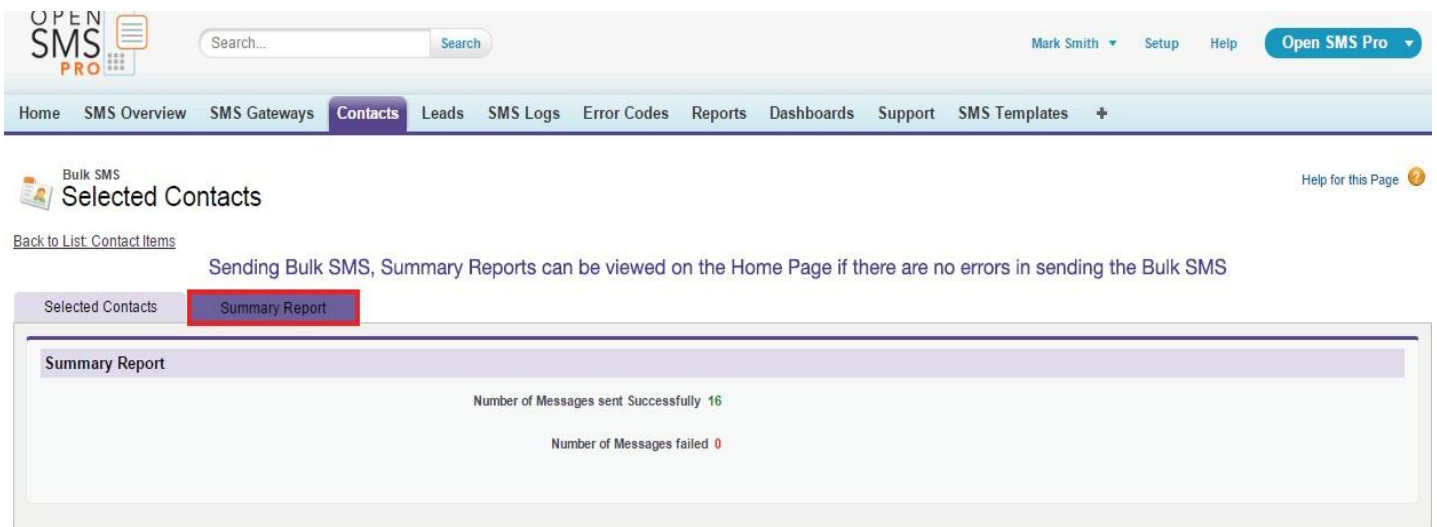
Message
I'm sorry we cannot lower the price of this item any further, but we have a similar product which is relatively cheaper because it doesn't have built-in face recognition. Would you be interested in taking a look?

Character count218 Characters

USER GUIDE FOR OPEN SMS PRO



d) By clicking on the 'Send' button, the user is directed to the 'Summary Report' screen which shows the number of messages successfully sent or the number of messages failed.



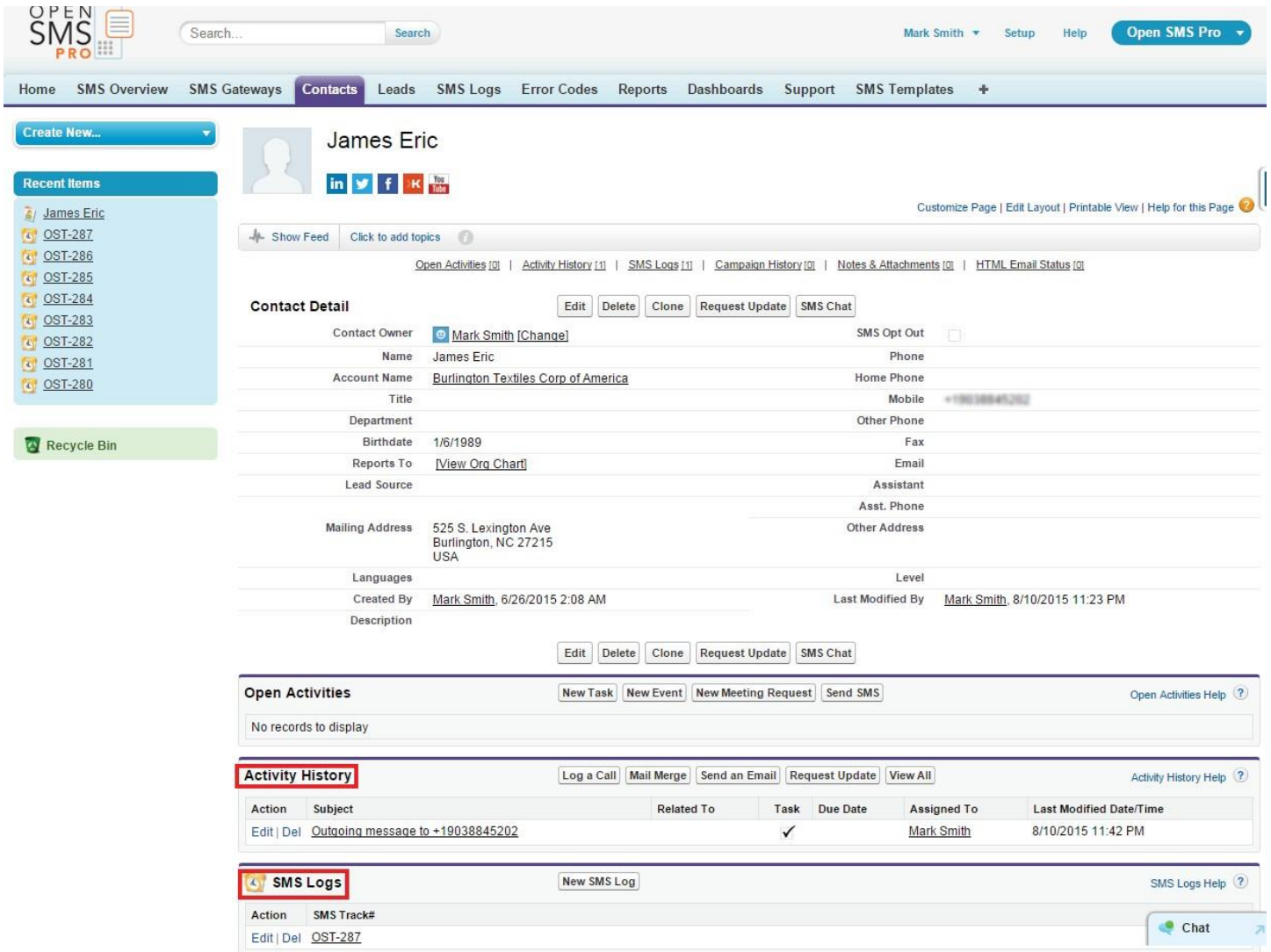
The screenshot displays the Open SMS Pro web interface. At the top, there is a navigation bar with the Open SMS Pro logo, a search bar, and user information (Mark Smith, Setup, Help, and an Open SMS Pro button). Below the navigation bar is a menu with links: Home, SMS Overview, SMS Gateways, Contacts (highlighted), Leads, SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates. The main content area is titled 'Bulk SMS Selected Contacts' and includes a 'Help for this Page' link. A message states: 'Sending Bulk SMS, Summary Reports can be viewed on the Home Page if there are no errors in sending the Bulk SMS'. Below this, there are two tabs: 'Selected Contacts' and 'Summary Report' (highlighted). The 'Summary Report' tab shows a table with two rows: 'Number of Messages sent Successfully' with a value of 16, and 'Number of Messages failed' with a value of 0.

Summary Report	
Number of Messages sent Successfully	16
Number of Messages failed	0

USER GUIDE FOR OPEN SMS PRO



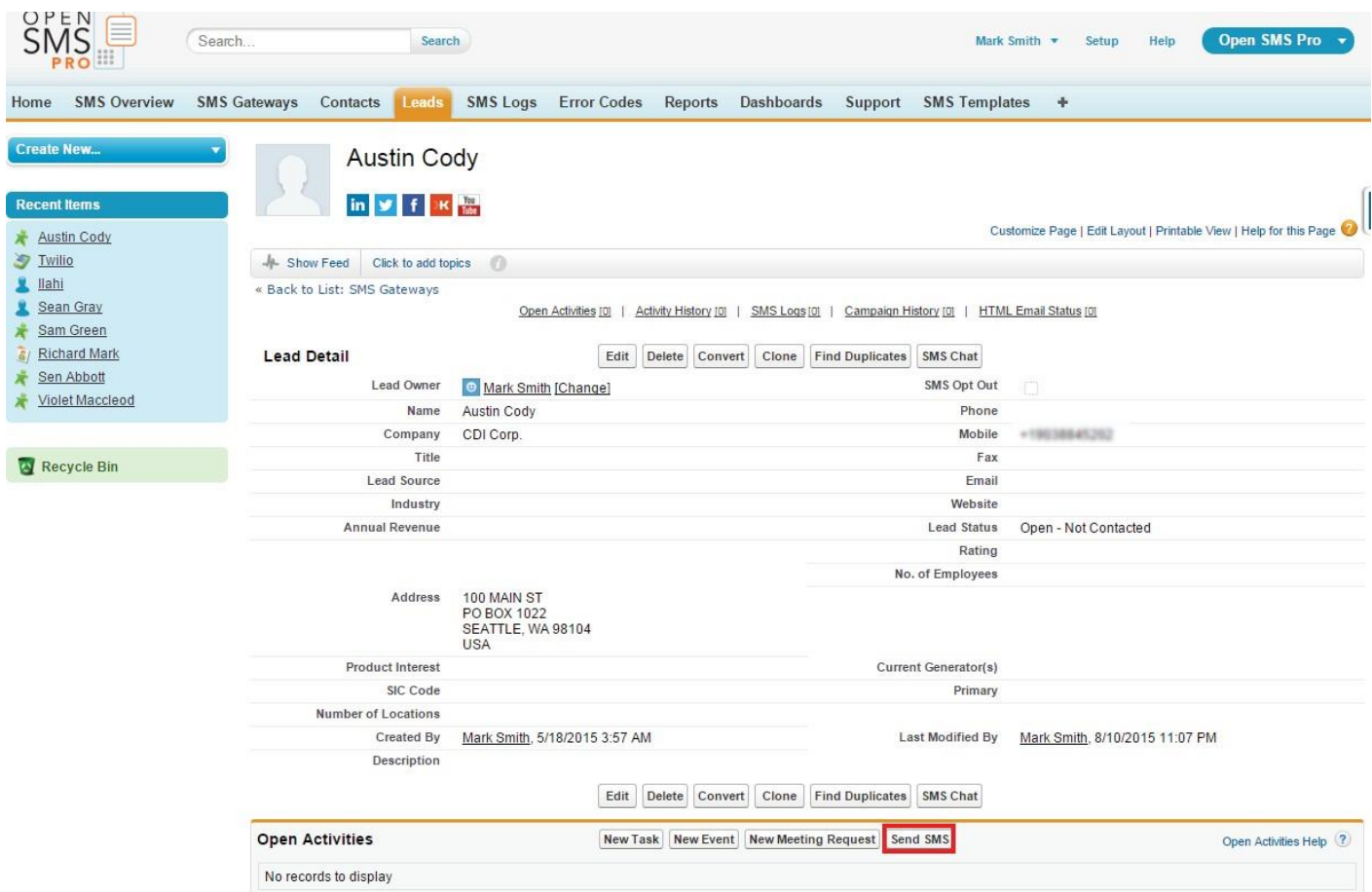
e) Once the message is delivered, the user can check the record history of the delivered message in the 'Activity History' section which shows the contents of the message. The 'SMS Logs' section shows records of the status of the message delivered and the contact number it was delivered to.



The screenshot displays the Open SMS Pro web application interface. The top navigation bar includes a search bar, user profile (Mark Smith), and links for Setup and Help. The main navigation menu lists various sections: Home, SMS Overview, SMS Gateways, **Contacts**, Leads, SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates. The left sidebar shows a 'Create New...' button and a 'Recent Items' list containing several OST-287 through OST-280 entries. The main content area displays the contact profile for 'James Eric'. The profile includes a header with the name and social media links, followed by a 'Show Feed' button and a list of tabs: Open Activities, Activity History, SMS Logs, Campaign History, Notes & Attachments, and HTML Email Status. The 'Contact Detail' section contains fields for Contact Owner (Mark Smith), Name (James Eric), Account Name (Burlington Textiles Corp of America), Title, Department, Birthdate (1/6/1989), Reports To (View Org Chart), Lead Source, Mailing Address (525 S. Lexington Ave, Burlington, NC 27215 USA), Languages, Level, Created By (Mark Smith, 6/26/2015 2:08 AM), Last Modified By (Mark Smith, 8/10/2015 11:23 PM), and Description. Below the contact details are buttons for Edit, Delete, Clone, Request Update, and SMS Chat. The 'Open Activities' section shows a 'No records to display' message. The 'Activity History' section is highlighted with a red box and shows a table with columns: Action, Subject, Related To, Task, Due Date, Assigned To, and Last Modified Date/Time. The table contains one record: 'Outgoing message to +19038845202' with a checkmark in the Task column and assigned to 'Mark Smith'. The 'SMS Logs' section is also highlighted with a red box and shows a table with columns: Action, SMS Track#, and Last Modified Date/Time. The table contains one record: 'OST-287'. A 'Chat' button is visible in the bottom right corner.

How to send Single SMS to Leads

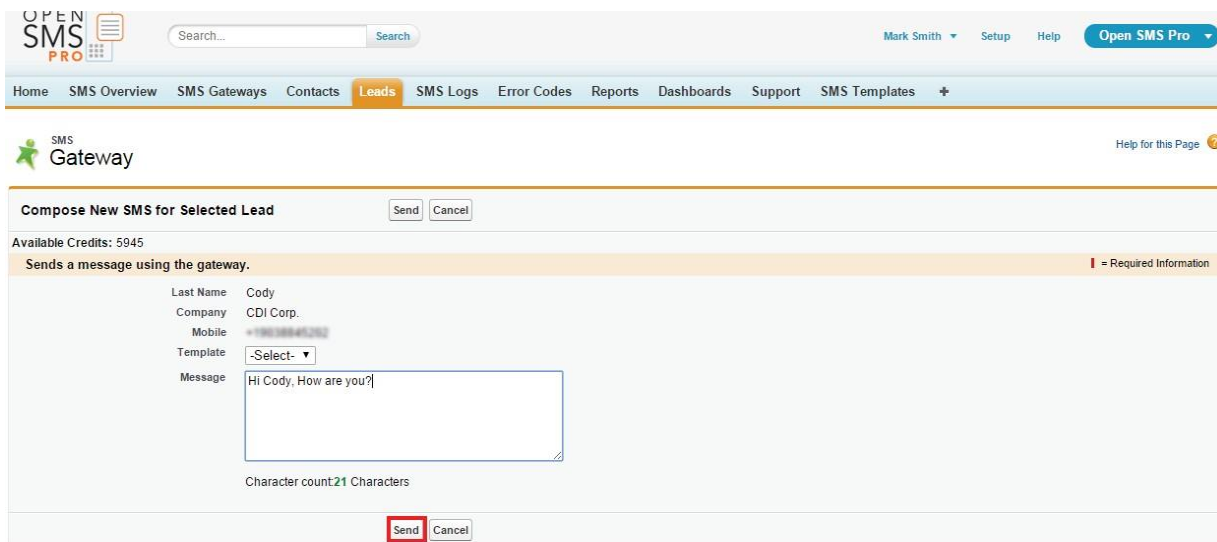
- Select the 'Open SMS' application from the Sales force application drop-down list.
- Click on the 'Leads' tab where you can choose a single lead and then send a message by clicking on the 'Send SMS' button in the 'Open Activities' section.



The screenshot displays the Open SMS Pro web application interface. At the top, there is a navigation bar with a search field, user name 'Mark Smith', and links for 'Setup', 'Help', and 'Open SMS Pro'. Below this is a secondary navigation bar with tabs: 'Home', 'SMS Overview', 'SMS Gateways', 'Contacts', 'Leads' (selected), 'SMS Logs', 'Error Codes', 'Reports', 'Dashboards', 'Support', and 'SMS Templates'. On the left side, there is a sidebar with a 'Create New...' button, a 'Recent Items' list (including Austin Cody, Twilio, Ilahi, Sean Gray, Sam Green, Richard Mark, Sen Abbott, and Violet MacCleod), and a 'Recycle Bin' button. The main content area shows the profile of 'Austin Cody' with social media links and a 'Show Feed' button. Below the profile, there are tabs for 'Open Activities', 'Activity History', 'SMS Logs', 'Campaign History', and 'HTML Email Status'. The 'Lead Detail' section for Austin Cody includes fields for Lead Owner (Mark Smith), Name, Company (CDI Corp.), Title, Lead Source, Industry, Annual Revenue, Address (100 MAIN ST, PO BOX 1022, SEATTLE, WA 98104, USA), Product Interest, SIC Code, Number of Locations, Created By (Mark Smith, 5/18/2015 3:57 AM), and Description. The 'SMS Opt Out' checkbox is checked. The 'Open Activities' section at the bottom has buttons for 'New Task', 'New Event', 'New Meeting Request', and 'Send SMS' (highlighted with a red box), along with an 'Open Activities Help' link.

USER GUIDE FOR OPEN SMS PRO

c) Send a message to the selected lead and type the message in the message box, as shown below. Click on the 'Send' button.



OPEN SMS PRO

Search... Search

Mark Smith Setup Help Open SMS Pro

Home SMS Overview SMS Gateways Contacts Leads SMS Logs Error Codes Reports Dashboards Support SMS Templates

SMS Gateway Help for this Page

Compose New SMS for Selected Lead Send Cancel

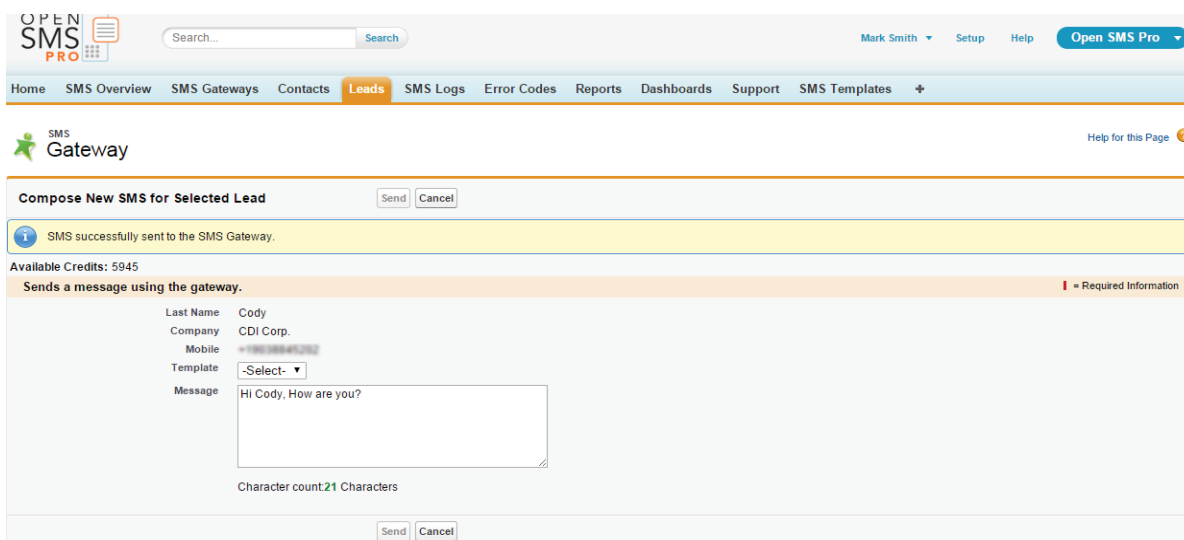
Available Credits: 5945

Sends a message using the gateway. Required Information

Last Name Cody
Company CDI Corp.
Mobile +1980-588-452362
Template -Select-
Message Hi Cody, How are you?
Character count 21 Characters

Send Cancel

d) If the message is delivered, you get a notification 'SMS successfully sent to the SMS Gateway'.



OPEN SMS PRO

Search... Search

Mark Smith Setup Help Open SMS Pro

Home SMS Overview SMS Gateways Contacts Leads SMS Logs Error Codes Reports Dashboards Support SMS Templates

SMS Gateway Help for this Page

Compose New SMS for Selected Lead Send Cancel

SMS successfully sent to the SMS Gateway.

Available Credits: 5945

Sends a message using the gateway. Required Information

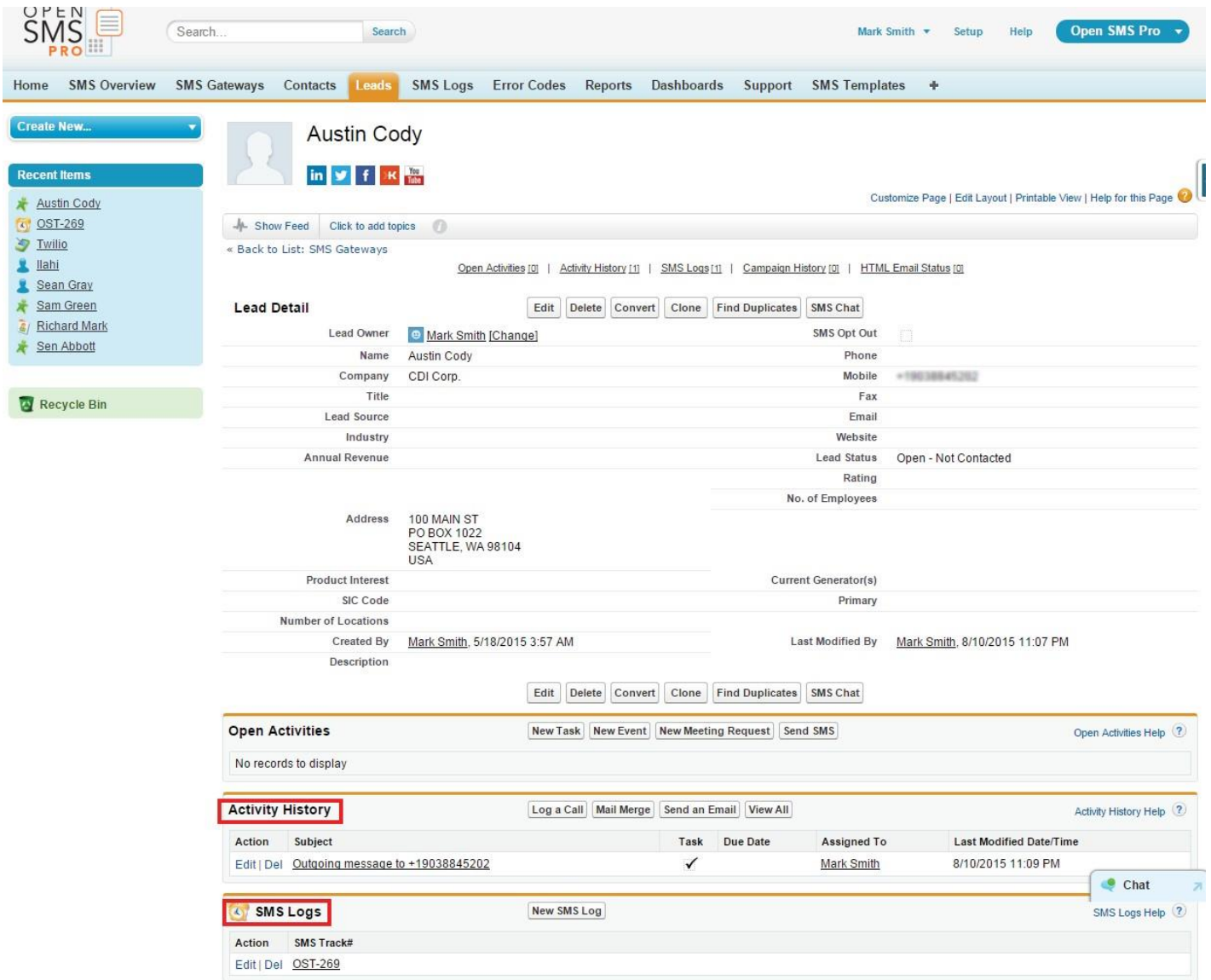
Last Name Cody
Company CDI Corp.
Mobile +1980-588-452362
Template -Select-
Message Hi Cody, How are you?
Character count 21 Characters

Send Cancel

USER GUIDE FOR OPEN SMS PRO



e) Once the message is delivered, the user can check the history of the delivered message in the 'Activity History' section which shows the content of the message. The 'SMS Logs' section shows records of the status of the message delivered and the phone number it was delivered to.



The screenshot displays the Open SMS Pro web application interface. The top navigation bar includes a search bar, user profile (Mark Smith), and links for Setup, Help, and Open SMS Pro. The main navigation menu lists various sections: Home, SMS Overview, SMS Gateways, Contacts, Leads (active), SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates.

The left sidebar contains a 'Create New...' button and a 'Recent Items' list with entries like Austin Cody, OST-269, Twilio, Ilahi, Sean Gray, Sam Green, Richard Mark, and Sen Abbott. A 'Recycle Bin' button is also present.

The main content area shows the 'Lead Detail' for 'Austin Cody'. The lead is owned by 'Mark Smith' and is associated with 'CDI Corp.'. The lead status is 'Open - Not Contacted'. The address is '100 MAIN ST, PO BOX 1022, SEATTLE, WA 98104, USA'. The lead was created by 'Mark Smith' on 5/18/2015 at 3:57 AM and last modified by 'Mark Smith' on 8/10/2015 at 11:07 PM.

Below the lead details, there are three sections:

- Open Activities:** Contains buttons for 'New Task', 'New Event', 'New Meeting Request', and 'Send SMS'. It currently shows 'No records to display'.
- Activity History:** Contains buttons for 'Log a Call', 'Mail Merge', 'Send an Email', and 'View All'. It shows a table with one record:

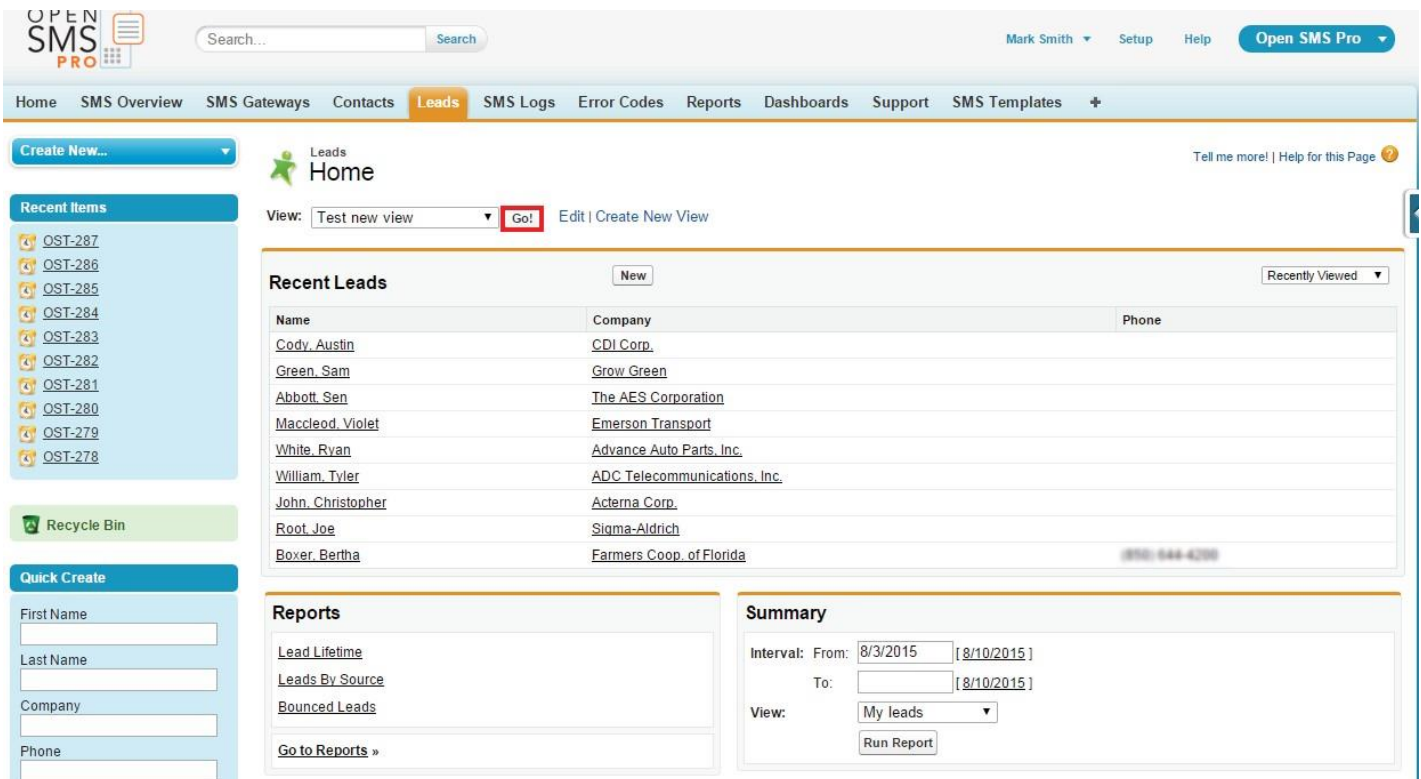
Action	Subject	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Outgoing message to +19038845202	✓		Mark Smith	8/10/2015 11:09 PM
- SMS Logs:** Contains a 'New SMS Log' button. It shows a table with one record:

Action	SMS Track#
Edit Del	OST-269

There are also 'Edit', 'Delete', 'Convert', 'Clone', 'Find Duplicates', and 'SMS Chat' buttons for each of these sections.

How to send Bulk SMS to Leads

a) Click on the 'Leads' tab and then click on the 'Go!' button, this will take you to the screen where all the Leads are listed.



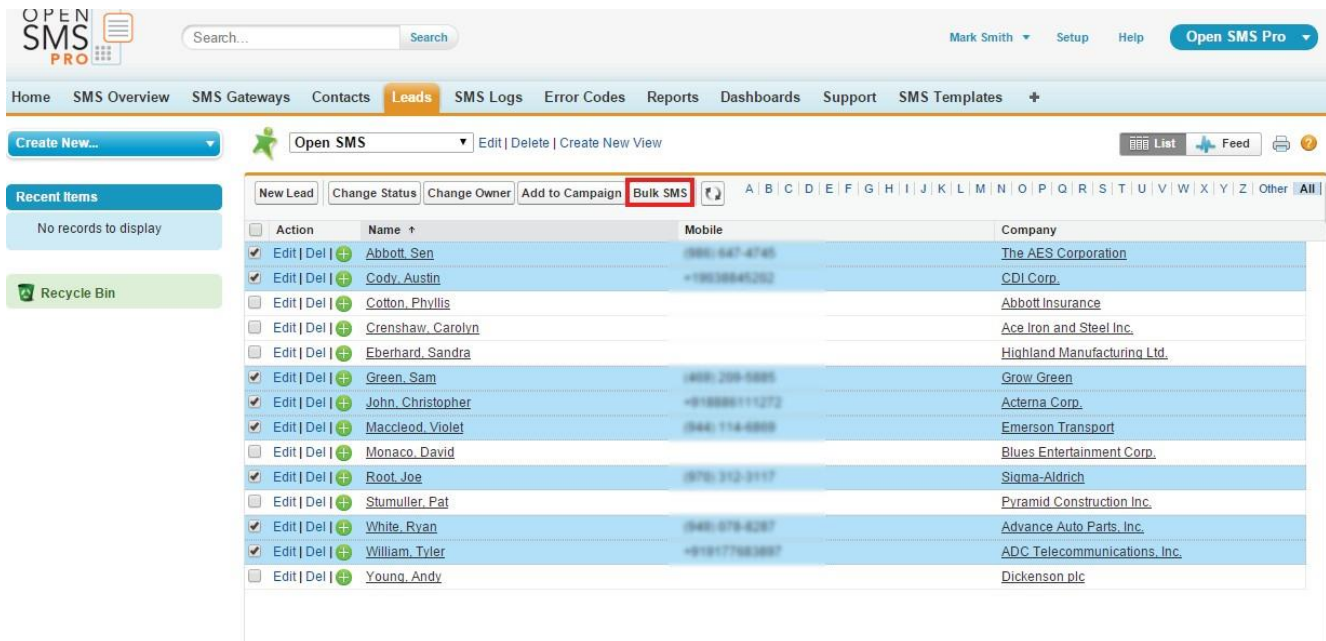
The screenshot shows the Open SMS Pro web application interface. The top navigation bar includes a search bar, user name (Mark Smith), and links for Setup, Help, and Open SMS Pro. The main navigation menu has tabs for Home, SMS Overview, SMS Gateways, Contacts, **Leads**, SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates. The 'Leads' tab is active, showing a 'Leads Home' section with a 'View:' dropdown set to 'Test new view' and a red-bordered 'Go!' button. Below this is a 'Recent Leads' table with columns for Name, Company, and Phone. The table lists several leads, including Cody Austin (CDI Corp), Green Sam (Grow Green), Abbott Sen (The AES Corporation), Maccleod Violet (Emerson Transport), White Ryan (Advance Auto Parts, Inc.), William Tyler (ADC Telecommunications, Inc.), John Christopher (Acterna Corp), Root Joe (Sigma-Aldrich), and Boxer Bertha (Farmers Coop. of Florida). To the left of the table is a 'Recent Items' list with links to various OST files. Below the table are two sections: 'Reports' with links for Lead Lifetime, Leads By Source, and Bounced Leads, and a 'Summary' section with date pickers for Interval (From: 8/3/2015, To: 8/10/2015) and a View dropdown set to 'My leads', with a 'Run Report' button.

Name	Company	Phone
Cody Austin	CDI Corp.	
Green Sam	Grow Green	
Abbott Sen	The AES Corporation	
Maccleod Violet	Emerson Transport	
White Ryan	Advance Auto Parts, Inc.	
William Tyler	ADC Telecommunications, Inc.	
John Christopher	Acterna Corp.	
Root Joe	Sigma-Aldrich	
Boxer Bertha	Farmers Coop. of Florida	(850) 644-4290

USER GUIDE FOR OPEN SMS PRO



b) Select only the Leads to whom you intend to send the SMS. Then click on the 'Bulk SMS' button to proceed.



The screenshot shows the OPEN SMS PRO web application interface. The top navigation bar includes a search bar, user profile (Mark Smith), and links for Setup, Help, and Open SMS Pro. The main navigation menu includes Home, SMS Overview, SMS Gateways, Contacts, Leads (selected), SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates. The 'Leads' section is active, displaying a list of leads with columns for Action, Name, Mobile, and Company. The 'Bulk SMS' button is highlighted in the top toolbar. The list of leads includes:

Action	Name	Mobile	Company
☒ Edit Del +	Abbott, Sen	(980) 547-4745	The AES Corporation
☒ Edit Del +	Cody, Austin	+19038845262	CDI Corp.
☐ Edit Del +	Cotton, Phyllis		Abbott Insurance
☐ Edit Del +	Crenshaw, Carolyn		Ace Iron and Steel Inc.
☐ Edit Del +	Eberhard, Sandra		Highland Manufacturing Ltd.
☒ Edit Del +	Green, Sam	(408) 259-5885	Grow Green
☒ Edit Del +	John, Christopher	+918886111272	Acterna Corp.
☒ Edit Del +	Macleod, Violet	(944) 114-8800	Emerson Transport
☐ Edit Del +	Monaco, David		Blues Entertainment Corp.
☒ Edit Del +	Root, Joe	(970) 312-3117	Sigma-Aldrich
☐ Edit Del +	Stumuller, Pat		Pyramid Construction Inc.
☒ Edit Del +	White, Ryan	(948) 579-6287	Advance Auto Parts, Inc.
☒ Edit Del +	William, Tyler	+919177683897	ADC Telecommunications, Inc.
☐ Edit Del +	Young, Andy		Dickenson plc

USER GUIDE FOR OPEN SMS PRO



c) As shown in the screen below, the user is provided with a preview of the selections made. The user can make edits by going back to the 'Selected Leads' page. The user can type the message in the message box and then click on the 'Send' button.



Mark Smith ▾
Setup
Help
Open SMS Pro ▾

Home
SMS Overview
SMS Gateways
Contacts
Leads
SMS Logs
Error Codes
Reports
Dashboards
Support
SMS Templates
+

Bulk SMS

Selected Leads
Help for this Page ?

[Back to List](#)
[Lead Items](#)

Selected Leads
Summary Report

Leads Selected

Send a message via SMS to one or more recipients using the Bulk messaging feature of your SMS Gateway. The message will be sent to all recipients listed below.

Lead	Company	Mobile Phone
Sam Green	Grow Green	(408) 208-5885
Violet MacCleod	Emerson Transport	(944) 114-6899
Ryan White	Advance Auto Parts, Inc.	(949) 978-8287
Joe Root	Sigma-Aldrich	(978) 312-3117
Sen Abbott	The AES Corporation	(980) 647-4745
Austin Cody	CDI Corp.	+19838845282
Christopher John	Acterna Corp.	+918886111272
Tyler William	ADC Telecommunications, Inc.	+919177683897

Template
-Select- ▾

Message

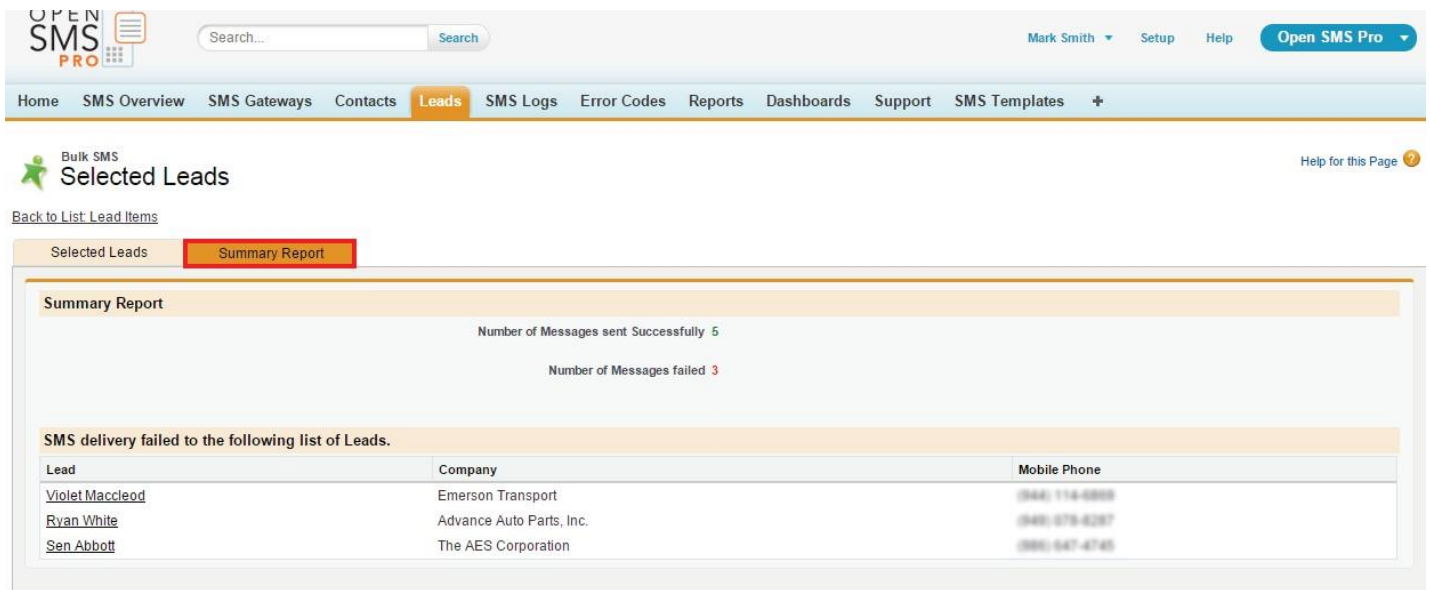
We haven't yet been able to complete the transition of your account due to a minor database issue on our server. We are working to fix this and hope to have everything ready for you by tomorrow. We will keep you posted on the situation.

Character count: 215 Characters

USER GUIDE FOR OPEN SMS PRO



d) After clicking on the 'Send' button, the user is directed to the 'Summary Report' screen which shows the number of messages sent successfully or the number of messages failed. In cases where messages could not be delivered, the user will see a notification 'SMS delivery failed to the following list of leads.'



Summary Report

Number of Messages sent Successfully 5

Number of Messages failed 3

SMS delivery failed to the following list of Leads.

Lead	Company	Mobile Phone
Violet Macleod	Emerson Transport	(940) 114-0800
Ryan White	Advance Auto Parts, Inc.	(940) 878-8287
Sen Abbott	The AES Corporation	(800) 647-4745

USER GUIDE FOR OPEN SMS PRO



e) Once the message is delivered, the user can check the record history of the delivered message in the 'Activity History' section which shows the contents of the message. The 'SMS Logs' section shows records of the status of the message delivered and the contact number it was delivered to.



Mark Smith
Setup
Help
Open SMS PRO

Home
SMS Overview
SMS Gateways
Contacts
Leads
SMS Logs
Error Codes
Reports
Dashboards
Support
SMS Templates
+

Create New...

Recent Items

- Austin Cody
- OST-295
- OST-294
- OST-293
- OST-292
- OST-291
- OST-290
- OST-289
- OST-288

Recycle Bin



Austin Cody

- in
- Twitter
- f
- K
- YouTube

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed
Click to add topics

Back to List: Leads

Lead Detail

Edit
Delete
Convert
Clone
Find Duplicates
SMS Chat

Lead Owner	Mark Smith [Change]	SMS Opt Out	☐
Name	Austin Cody	Phone	
Company	CDI Corp.	Mobile	+19038845202
Title		Fax	
Lead Source		Email	
Industry		Website	
Annual Revenue		Lead Status	Open - Not Contacted
		Rating	
		No. of Employees	
Address	100 MAIN ST PO BOX 1022 SEATTLE, WA 98104 USA		
Product Interest		Current Generator(s)	
SIC Code		Primary	
Number of Locations			
Created By	Mark Smith, 5/18/2015 3:57 AM	Last Modified By	Mark Smith, 8/10/2015 11:52 PM
Description			

Edit
Delete
Convert
Clone
Find Duplicates
SMS Chat

Open Activities

New Task
New Event
New Meeting Request
Send SMS

Open Activities Help

No records to display

Activity History

Log a Call
Mail Merge
Send an Email
View All

Activity History Help

Action	Subject	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Outgoing message to +19038845202	✓		Mark Smith	8/10/2015 11:57 PM

SMS Logs

New SMS Log

SMS Logs Help

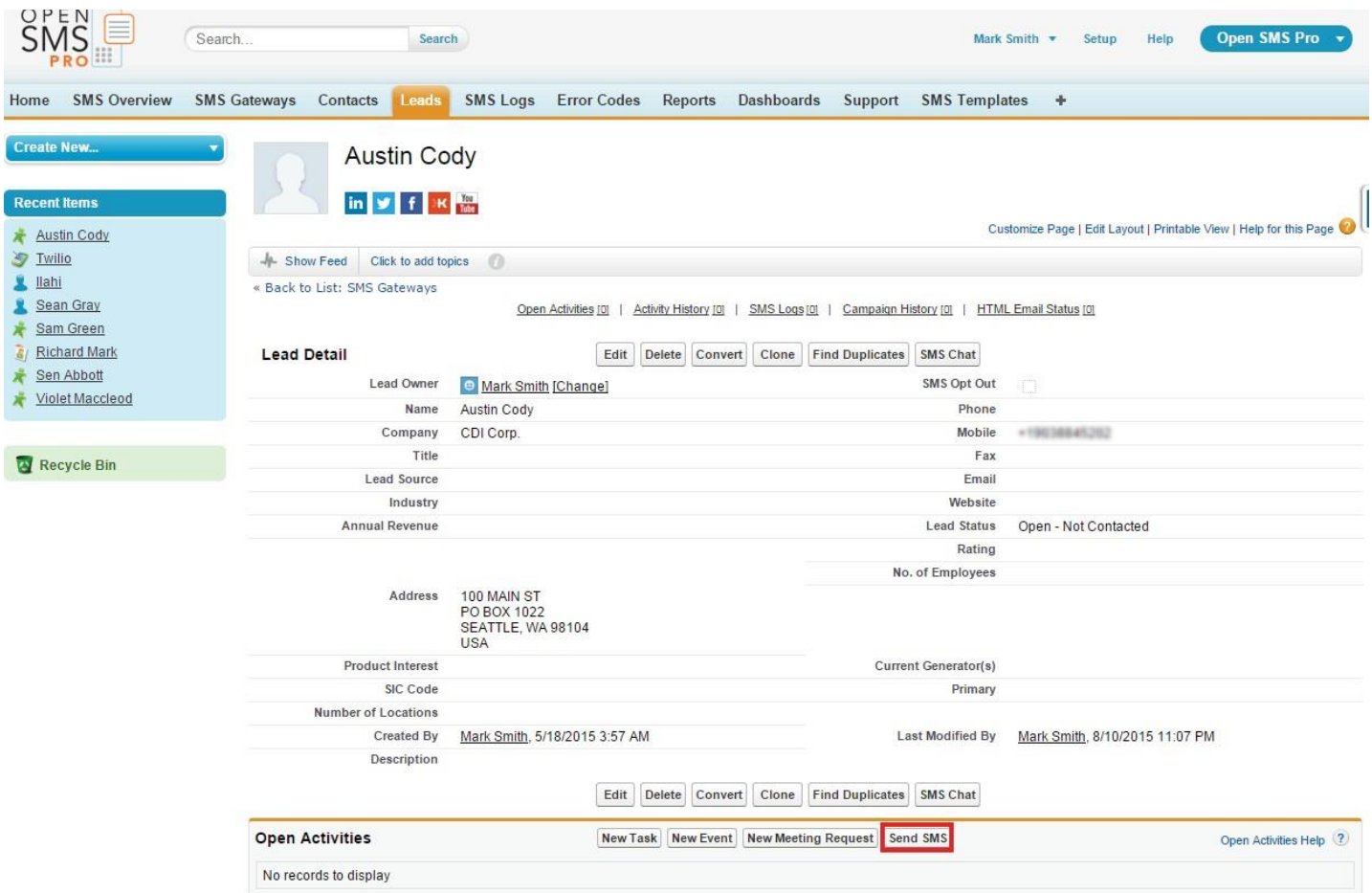
Action	SMS Track#
Edit Del	OST-293

USER GUIDE FOR OPEN SMS PRO



How to use 2-Way-SMS

a) Click on the 'Leads' tab in the Open SMS application, select the Lead to whom the message is to be sent and click on the 'Send SMS' button.



The screenshot shows the Open SMS Pro application interface. The top navigation bar includes a search bar, user profile (Mark Smith), and links for Setup, Help, and Open SMS Pro. The main navigation bar lists various tabs: Home, SMS Overview, SMS Gateways, Contacts, **Leads**, SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates. A sidebar on the left contains a 'Create New...' button, a 'Recent Items' list (Austin Cody, Twilio, Ilahi, Sean Gray, Sam Green, Richard Mark, Sen Abbott, Violet Maccleod), and a 'Recycle Bin' button.

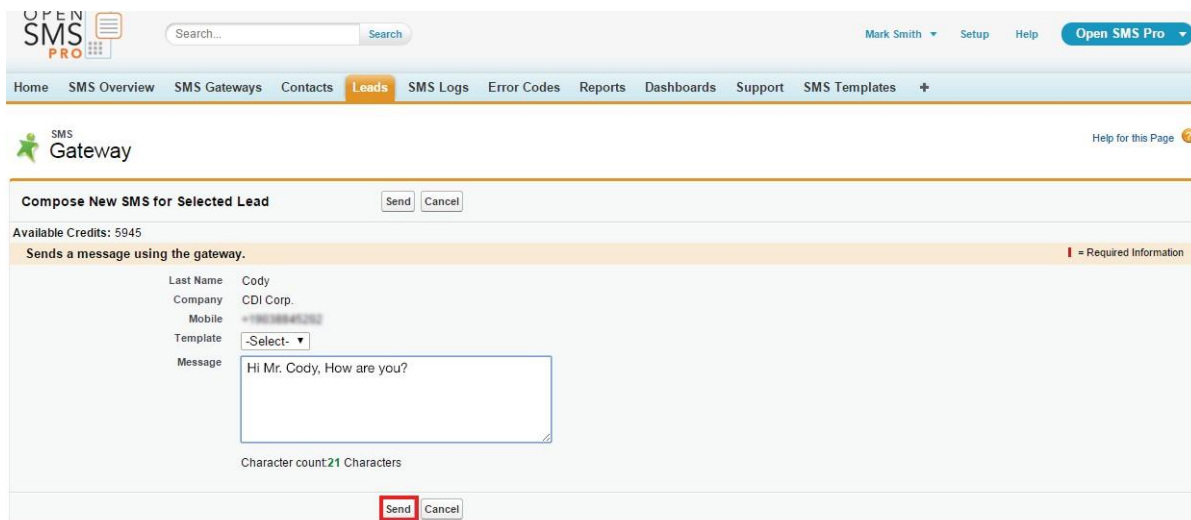
The 'Lead Detail' section for 'Austin Cody' is displayed. It includes a profile picture, social media links, and a 'Show Feed' button. The 'Lead Detail' table shows the following information:

Lead Owner	Mark Smith [Change]	SMS Opt Out	☐
Name	Austin Cody	Phone	
Company	CDI Corp.	Mobile	+190388452102
Title		Fax	
Lead Source		Email	
Industry		Website	
Annual Revenue		Lead Status	Open - Not Contacted
		Rating	
		No. of Employees	
Address	100 MAIN ST PO BOX 1022 SEATTLE, WA 98104 USA		
Product Interest		Current Generator(s)	
SIC Code		Primary	
Number of Locations			
Created By	Mark Smith, 5/18/2015 3:57 AM	Last Modified By	Mark Smith, 8/10/2015 11:07 PM
Description			

Below the 'Lead Detail' table, there are buttons for 'Edit', 'Delete', 'Convert', 'Clone', 'Find Duplicates', and 'SMS Chat'. The 'Open Activities' section at the bottom shows a list of activities with buttons for 'New Task', 'New Event', 'New Meeting Request', and 'Send SMS' (highlighted in red). The 'Open Activities' section currently displays 'No records to display'.

USER GUIDE FOR OPEN SMS PRO

b) After clicking on the 'Send SMS' button, you will be directed to the page below. Type a message in the message box as shown below. Click on the 'Send' button. Please note that the message should be limited to a maximum of 160 characters.



OPEN SMS PRO

Search... Search

Mark Smith Setup Help Open SMS Pro

Home SMS Overview SMS Gateways Contacts Leads SMS Logs Error Codes Reports Dashboards Support SMS Templates +

SMS Gateway Help for this Page

Compose New SMS for Selected Lead Send Cancel

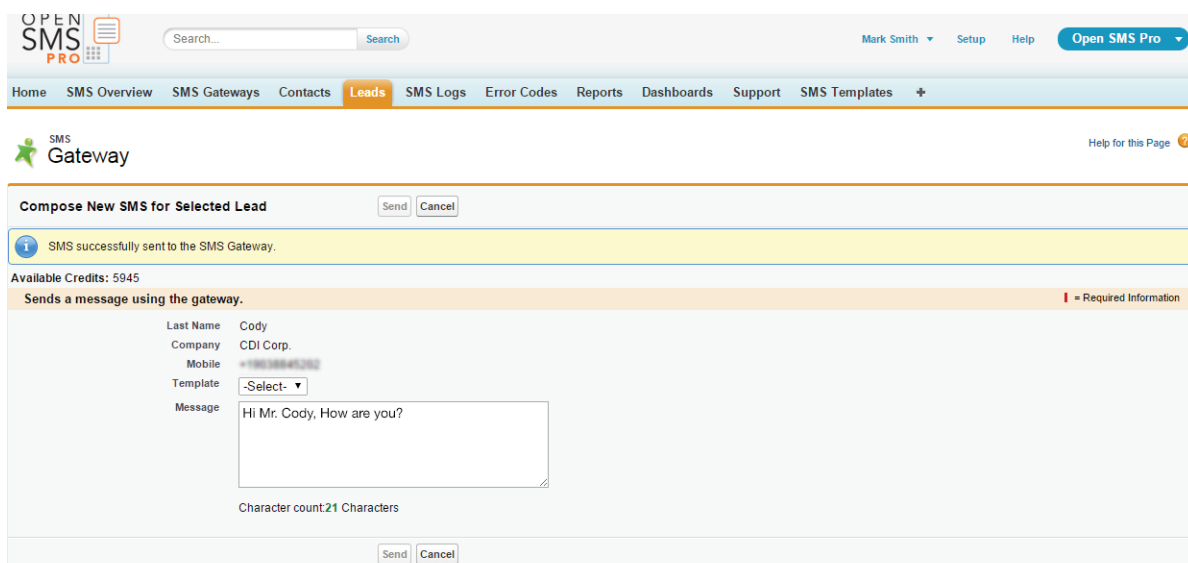
Available Credits: 5945

Sends a message using the gateway. Required Information

Last Name Cody
Company CDI Corp.
Mobile +18008845262
Template -Select-
Message Hi Mr. Cody, How are you?
Character count 21 Characters

Send Cancel

c) If the message is delivered, the user gets a notification 'SMS successfully sent to the SMS Gateway'.



OPEN SMS PRO

Search... Search

Mark Smith Setup Help Open SMS Pro

Home SMS Overview SMS Gateways Contacts Leads SMS Logs Error Codes Reports Dashboards Support SMS Templates +

SMS Gateway Help for this Page

Compose New SMS for Selected Lead Send Cancel

SMS successfully sent to the SMS Gateway.

Available Credits: 5945

Sends a message using the gateway. Required Information

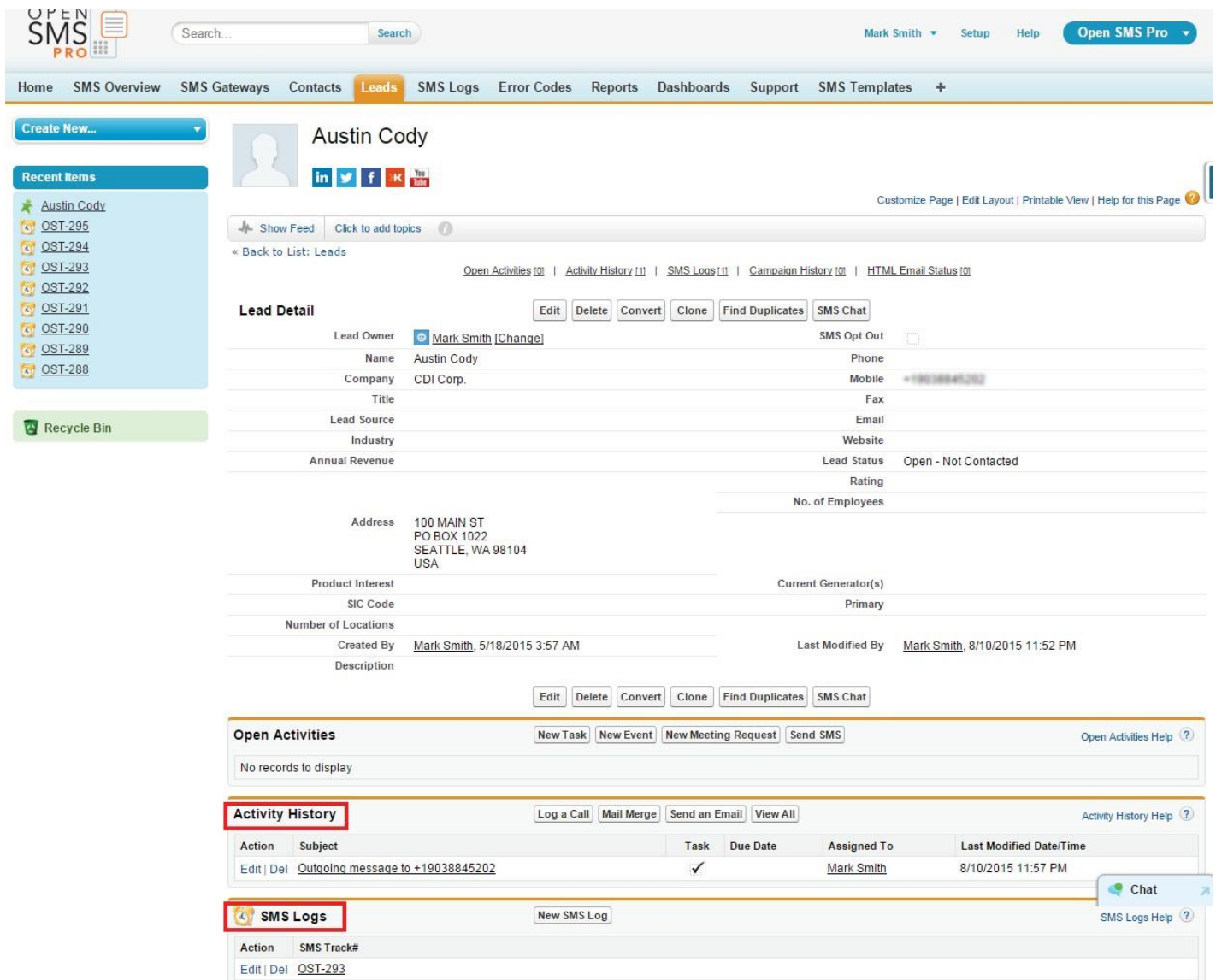
Last Name Cody
Company CDI Corp.
Mobile +18008845262
Template -Select-
Message Hi Mr. Cody, How are you?
Character count 21 Characters

Send Cancel

USER GUIDE FOR OPEN SMS PRO



d) Once the message is delivered, the user can check the record history of the delivered message in the 'Activity History' section which shows the contents of the message. The 'SMS Logs' section shows records of the status of the message delivered and the contact number it was delivered to.



The screenshot displays the Open SMS Pro web application interface. At the top, there is a navigation bar with a search bar, user profile (Mark Smith), and links for Setup, Help, and Open SMS Pro. Below this is a main navigation menu with options like Home, SMS Overview, SMS Gateways, Contacts, Leads (selected), SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates.

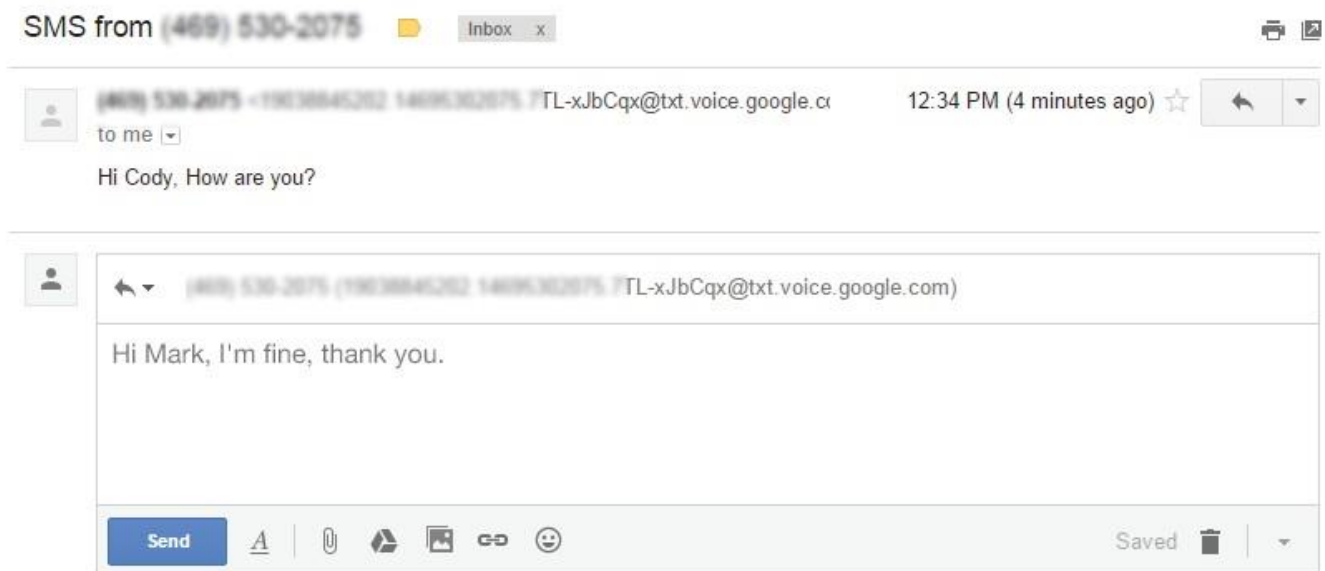
The main content area shows the 'Lead Detail' for 'Austin Cody'. It includes a 'Recent Items' sidebar on the left with a list of items like 'Austin Cody', 'OST-295', 'OST-294', etc. The lead details are organized into two columns. The left column contains fields for Lead Owner (Mark Smith), Name (Austin Cody), Company (CDI Corp.), Title, Lead Source, Industry, Annual Revenue, Address (100 MAIN ST, PO BOX 1022, SEATTLE, WA 98104 USA), Product Interest, SIC Code, Number of Locations, Created By (Mark Smith), and Description. The right column contains fields for SMS Opt Out, Phone, Mobile (+19038845202), Fax, Email, Website, Lead Status (Open - Not Contacted), Rating, and No. of Employees. Action buttons like Edit, Delete, Convert, Clone, Find Duplicates, and SMS Chat are available for the lead.

Below the lead details, there are three sections: 'Open Activities' (with buttons for New Task, New Event, New Meeting Request, Send SMS), 'Activity History' (with buttons for Log a Call, Mail Merge, Send an Email, View All), and 'SMS Logs' (with a New SMS Log button). The 'Activity History' section shows a table with columns for Action, Subject, Task, Due Date, Assigned To, and Last Modified Date/Time. The 'SMS Logs' section shows a table with columns for Action and SMS Track#.

USER GUIDE FOR OPEN SMS PRO



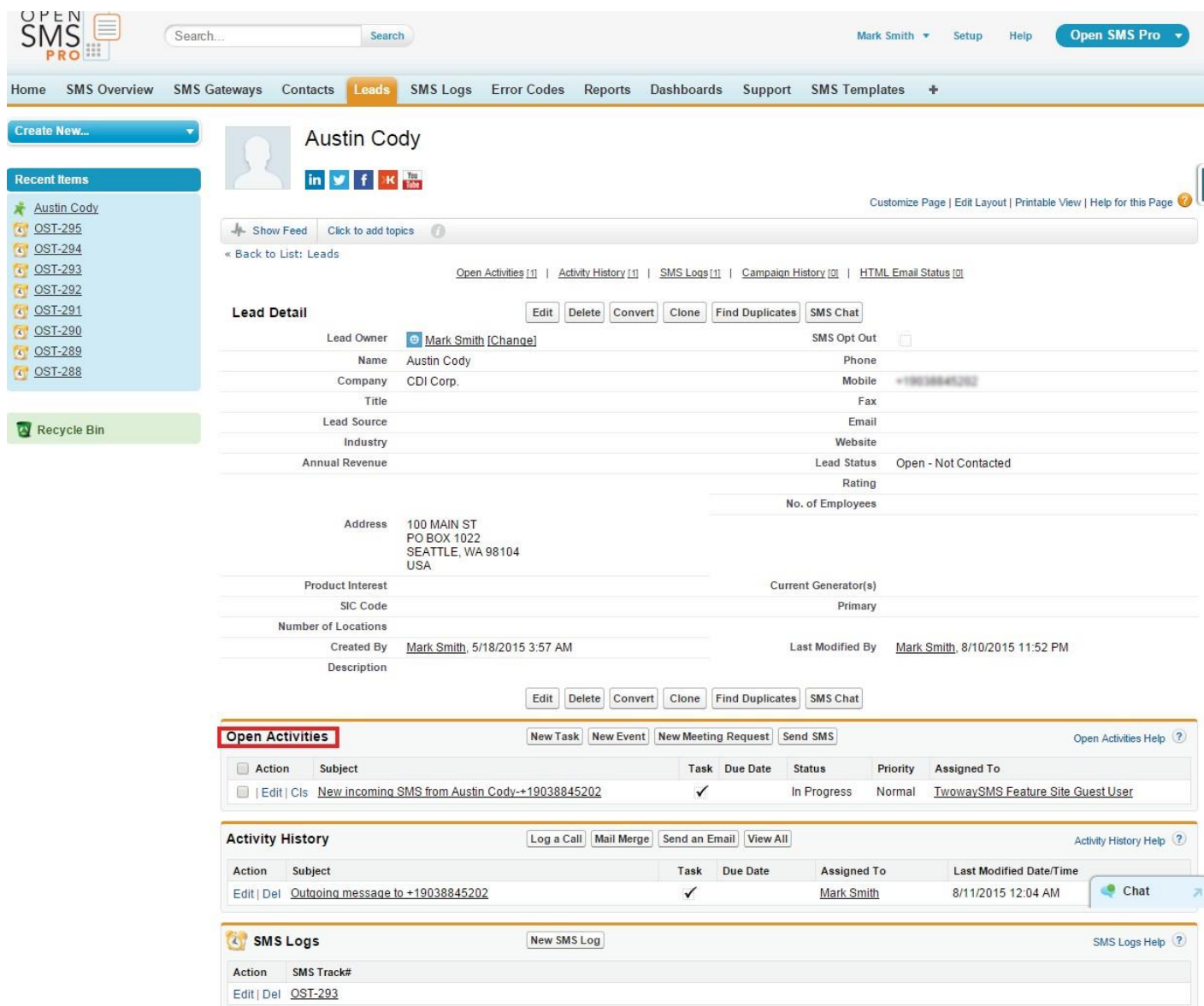
e) Here is a screen shot of how the 2-way SMS interaction takes place:



USER GUIDE FOR OPEN SMS PRO



f) Once the user receives an incoming message, it is displayed in the 'Open Activities' section along with the original message. The 'SMS Logs' section shows the delivery status of the message.



The screenshot displays the Open SMS PRO web application interface. At the top, there is a navigation bar with the AppShark logo, a search bar, and user information (Mark Smith, Setup, Help, Open SMS Pro). Below the navigation bar is a menu with options: Home, SMS Overview, SMS Gateways, Contacts, Leads (selected), SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates.

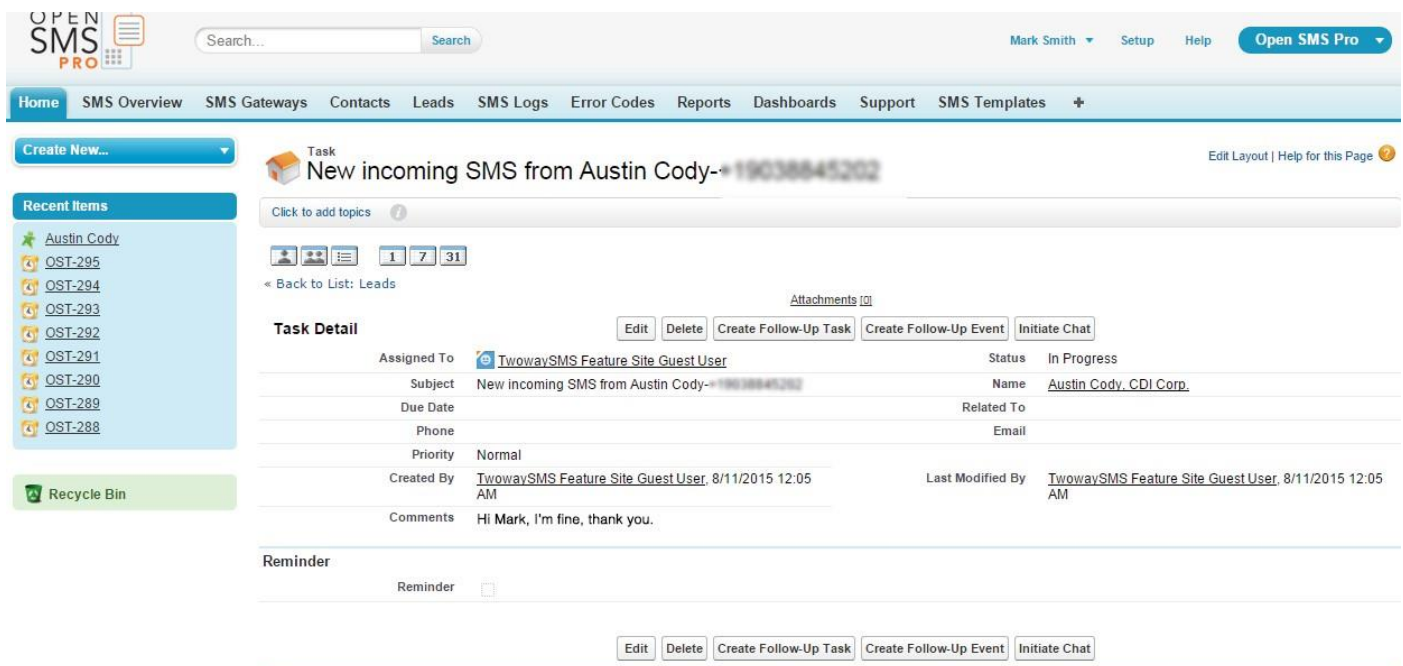
The main content area shows the 'Lead Detail' for 'Austin Cody'. The lead is owned by 'Mark Smith' and is currently 'Open - Not Contacted'. The lead's address is '100 MAIN ST, PO BOX 1022, SEATTLE, WA 98104, USA'. The lead's phone number is '+19038845202'. The lead's email is 'twowaySMS@feature.site'. The lead's rating is 'No. of Employees'. The lead's description is 'New incoming SMS from Austin Cody-->19038845202'.

Below the lead detail, there are three sections: 'Open Activities', 'Activity History', and 'SMS Logs'. The 'Open Activities' section shows a table with columns: Action, Subject, Task, Due Date, Status, Priority, and Assigned To. The first row shows a 'New incoming SMS from Austin Cody-->19038845202' with a status of 'In Progress' and assigned to 'TwowaySMS Feature Site Guest User'. The 'Activity History' section shows a table with columns: Action, Subject, Task, Due Date, Assigned To, and Last Modified Date/Time. The first row shows an 'Outgoing message to +19038845202' with a status of 'In Progress' and assigned to 'Mark Smith'. The 'SMS Logs' section shows a table with columns: Action, SMS Track#, and Last Modified Date/Time. The first row shows a log for 'OST-293'.

USER GUIDE FOR OPEN SMS PRO



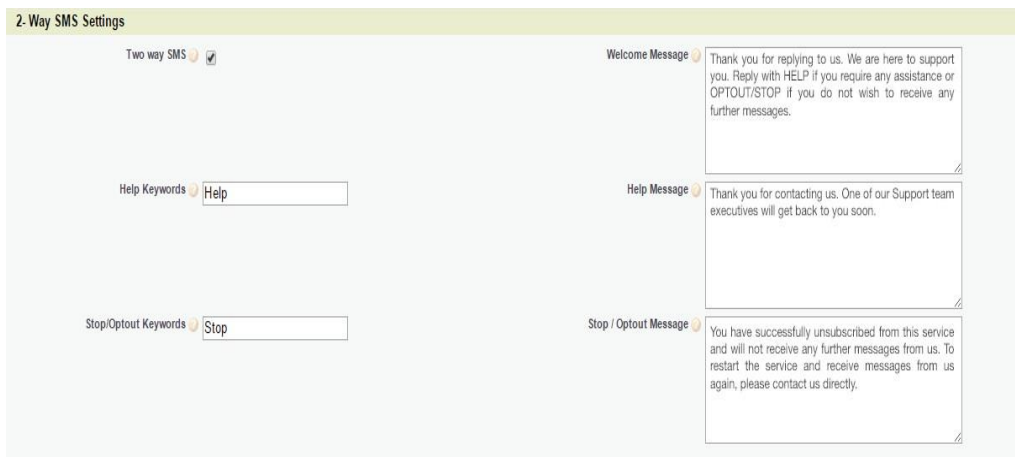
g) The screen shot below is a transcript of the incoming SMS received from a lead showing the content of the message, status of delivery and other important details.



The screenshot displays the Open SMS Pro web application interface. At the top, there is a search bar and navigation links for Mark Smith, Setup, Help, and Open SMS Pro. Below this is a main navigation menu with options like Home, SMS Overview, SMS Gateways, Contacts, Leads, SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates. A left sidebar contains a 'Create New...' button and a 'Recent Items' list with entries like Austin Cody, OST-295, OST-294, OST-293, OST-292, OST-291, OST-290, OST-289, and OST-288. The main content area shows a task titled 'New incoming SMS from Austin Cody-+19038845202'. It includes a 'Click to add topics' button, a calendar icon, and a 'Back to List: Leads' link. The 'Task Detail' section shows the task assigned to 'TwowaySMS Feature Site Guest User' with a status of 'In Progress'. The subject is 'New incoming SMS from Austin Cody-+19038845202', and the name is 'Austin Cody, CDI Corp.'. The due date, phone, and email fields are empty. The priority is 'Normal'. The task was created by 'TwowaySMS Feature Site Guest User' on 8/11/2015 at 12:05 AM and last modified by the same user at the same time. The comments section shows 'Hi Mark, I'm fine, thank you.' Below the task details is a 'Reminder' section with a checkbox. At the bottom of the task detail, there are buttons for Edit, Delete, Create Follow-Up Task, Create Follow-Up Event, and Initiate Chat.

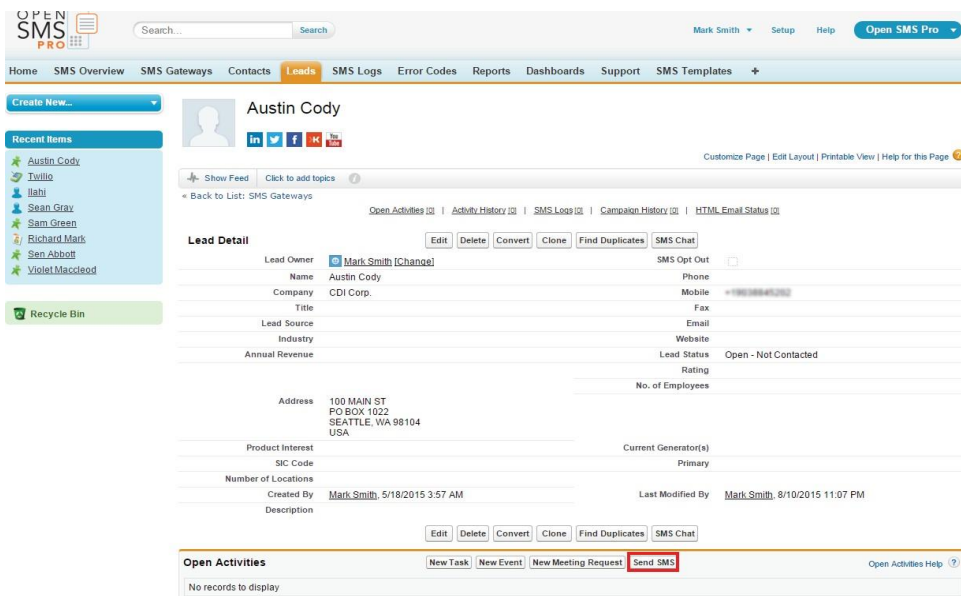
Set multiple action keywords & auto reply messages

a) On the 'SMS Gateway' tab click on the default gateway provider to find the '2-WaySMS Settings' section. Here the user has to create the appropriate 'WELCOME' 'STOP'/'OPT OUT' and 'HELP' messages that will be sent as replies to the Contact/Lead.



The screenshot shows the '2-Way SMS Settings' form. It includes fields for 'Two way SMS' (checked), 'Help Keywords' (set to 'Help'), and 'Stop/Optout Keywords' (set to 'Stop'). On the right, there are three text areas for auto-reply messages: 'Welcome Message', 'Help Message', and 'Stop / Optout Message'. Each message area contains a pre-defined response text.

b) Click on the 'Contacts' or 'Leads' tab in the Open SMS application, select the Contact or Lead to whom the message is to be sent and click on the 'Send SMS' button.

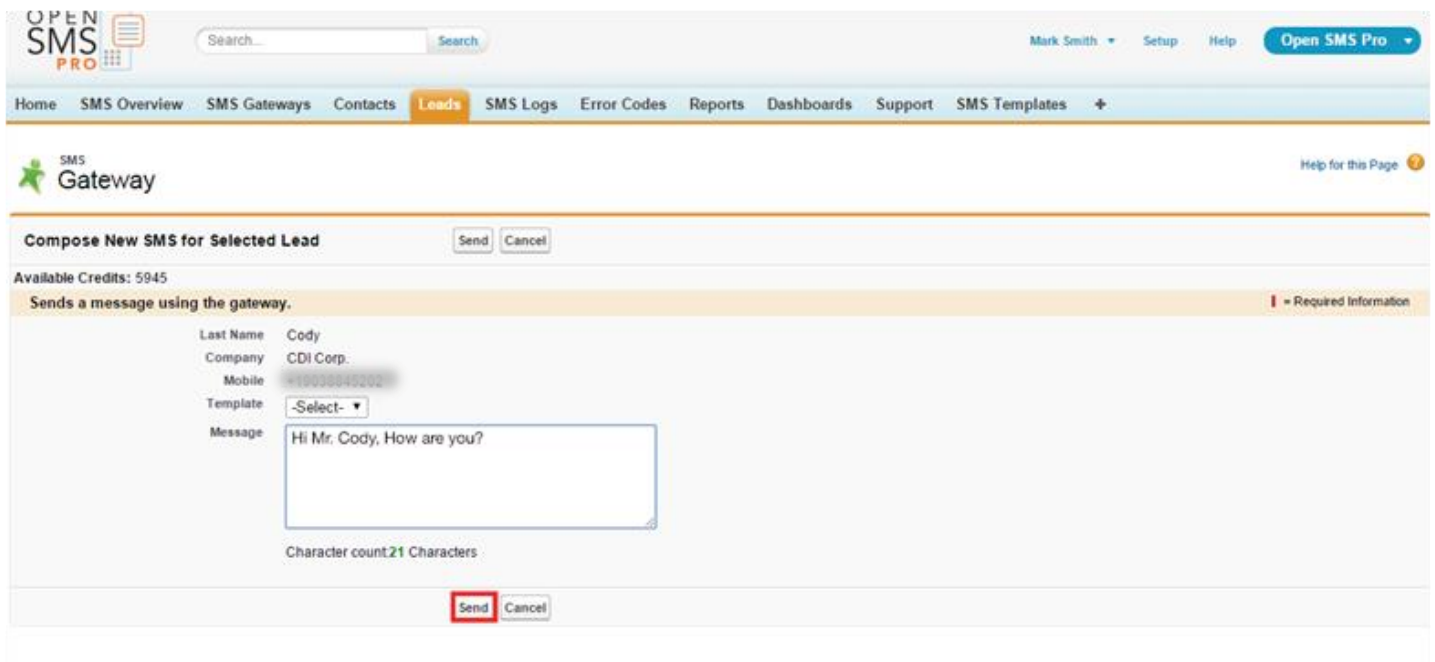


The screenshot shows the Open SMS Pro application interface. The 'Leads' tab is selected, and a lead named 'Austin Cody' is displayed. The 'Lead Detail' section shows various fields including Name, Company, Title, Lead Source, Industry, Annual Revenue, Address, Product Interest, SIC Code, Number of Locations, Created By, and Description. The 'SMS Opt Out' checkbox is checked. The 'Open Activities' section at the bottom shows a list of activities, with 'Send SMS' highlighted.

USER GUIDE FOR OPEN SMS PRO



c) After clicking on the 'Send SMS' button, the user is directed to the page below. Type a message in the message box as shown below. Click on the 'Send' button.

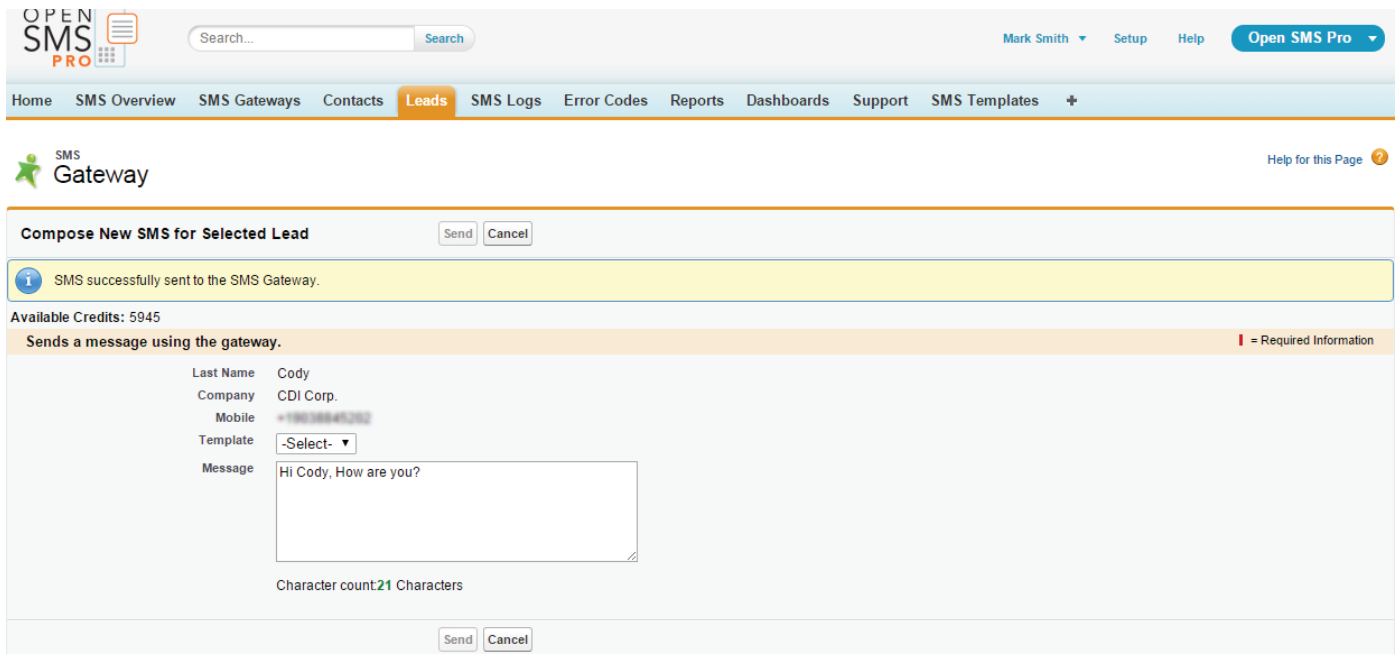


The screenshot shows the 'Gateway' page in the OPEN SMS PRO application. The page title is 'SMS Gateway'. Below the title, there is a section 'Compose New SMS for Selected Lead' with 'Send' and 'Cancel' buttons. The page indicates 'Available Credits: 5945'. A message is being composed using the gateway. The form includes fields for 'Last Name' (Cody), 'Company' (CDI Corp.), 'Mobile' (+15036845202), and 'Template' (-Select-). The 'Message' field contains 'Hi Mr. Cody, How are you?'. A 'Character count' shows 21 Characters. At the bottom, there are 'Send' and 'Cancel' buttons, with the 'Send' button highlighted by a red box.

USER GUIDE FOR OPEN SMS PRO



d) If the message is delivered, the user gets a notification 'SMS successfully sent to the SMS Gateway.'



Compose New SMS for Selected Lead

SMS successfully sent to the SMS Gateway.

Available Credits: 5945

Sends a message using the gateway. ! = Required Information

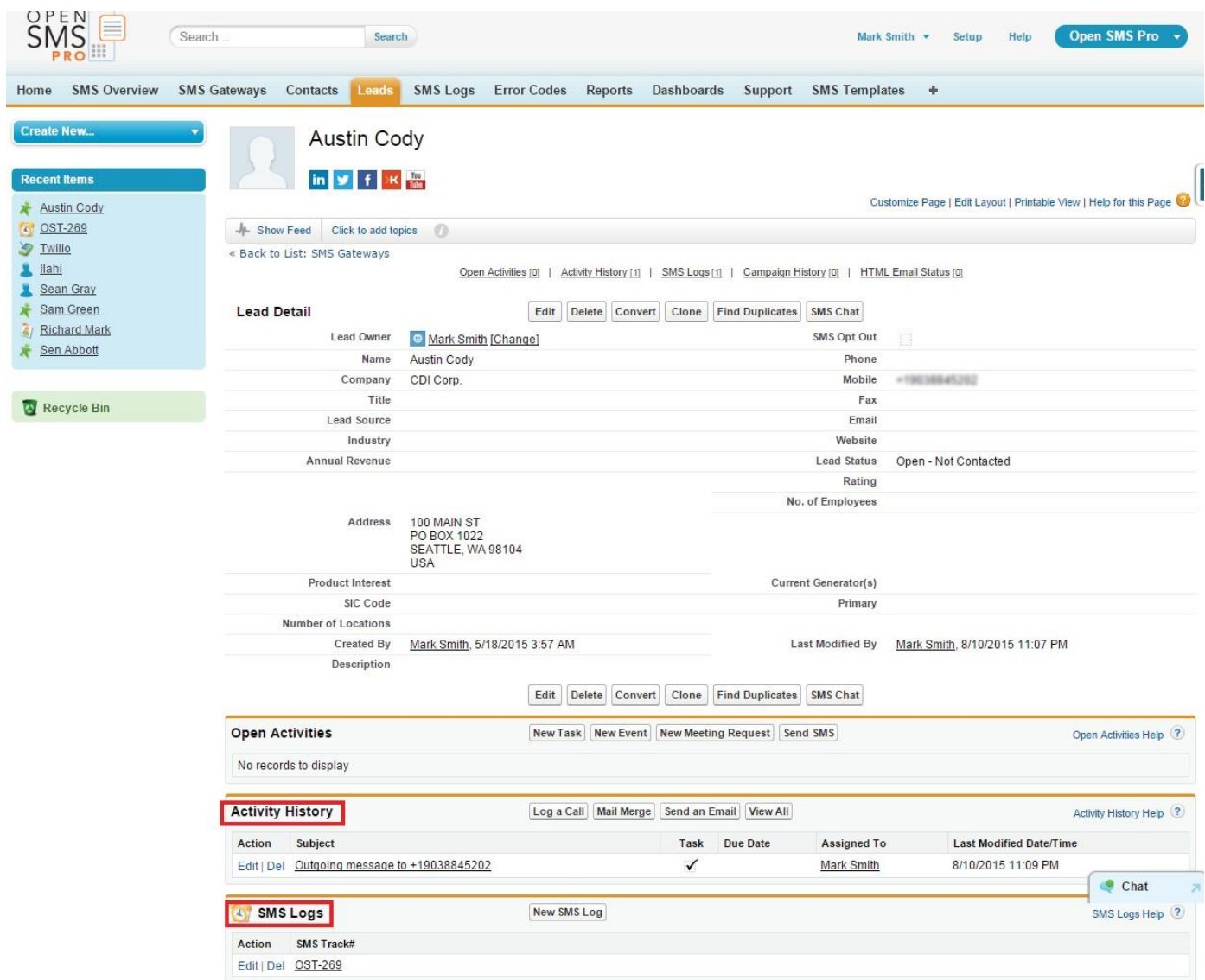
Last Name	Cody
Company	CDI Corp.
Mobile	+19038845252
Template	-Select-
Message	Hi Cody, How are you?

Character count 21 Characters

USER GUIDE FOR OPEN SMS PRO



e) Once the message is delivered, the user can check the record history of the delivered message in the 'Activity History' section which shows the contents of the message. The 'SMS Logs' section shows records of the status of the message delivered and the contact number it was delivered to.



The screenshot displays the Open SMS Pro web application interface. The top navigation bar includes a search bar, user profile (Mark Smith), and links for Setup, Help, and Open SMS Pro. The main navigation menu lists various sections: Home, SMS Overview, SMS Gateways, Contacts, Leads (active), SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates.

The left sidebar contains a 'Create New...' button, a 'Recent Items' list with contacts like Austin Cody, OST-269, Twilio, Ilahi, Sean Gray, Sam Green, Richard Mark, and Sen Abbott, and a 'Recycle Bin'.

The main content area shows the 'Lead Detail' for 'Austin Cody'. It includes a profile picture, social media links, and a 'Show Feed' button. Below this, there are tabs for 'Open Activities', 'Activity History', 'SMS Logs', 'Campaign History', and 'HTML Email Status'. The 'Lead Detail' section contains a form with fields for Lead Owner (Mark Smith), Name (Austin Cody), Company (CDI Corp.), Title, Lead Source, Industry, Annual Revenue, Address (100 MAIN ST, PO BOX 1022, SEATTLE, WA 98104, USA), Product Interest, SIC Code, Number of Locations, Created By (Mark Smith), and Last Modified By (Mark Smith). There are also buttons for Edit, Delete, Convert, Clone, Find Duplicates, and SMS Chat.

Below the lead details, there are three sections: 'Open Activities' (No records to display), 'Activity History' (Log a Call, Mail Merge, Send an Email, View All), and 'SMS Logs' (New SMS Log). The 'Activity History' section shows a table with columns: Action, Subject, Task, Due Date, Assigned To, and Last Modified Date/Time. The 'SMS Logs' section shows a table with columns: Action, SMS Track#, and Last Modified Date/Time.

USER GUIDE FOR OPEN SMS PRO



f) Here is a screen shot of the interaction that takes place:

SMS from (469) 530-2075

Inbox x






(469) 530-2075 <(469)530-2075-14695302075.7TL-xJbCqx@txt.voice.google.i>

12:34 PM (15 minutes ago) ☆




to me

Hi Cody, How are you?





(469) 530-2075 <(469)530-2075-14695302075.7TL-xJbCqx@txt.voice.google.com>

Hi Mark, I'm fine, thank you.

Send








Saved 

g) Once the Lead/Contact replies back to the user's SMS for the first time, Open SMS Pro will send an auto reply SMS from the specified 'WELCOME' message created by the user in Step a).

SMS from (469) 530-2075

Inbox x






(469) 530-2075 <(469)530-2075-14695302075.7TL-xJbCqx@txt.voice.google.co>

12:51 PM (1 minute ago) ☆




to me

Thank you for replying to us. We are here to support you. Reply with HELP if you require any assistance or OPTOUT/STOP if you do not wish to receive any further messages.

USER GUIDE FOR OPEN SMS PRO



h) The user can check the incoming message in the 'Open Activities' section.

OPEN SMS PRO

Search... Search

Mark Smith Setup Help Open SMS Pro

Home SMS Overview SMS Gateways Contacts **Leads** SMS Logs Error Codes Reports Dashboards Support SMS Templates +

Create New...

Recent Items

- Austin Cody
- Twilio
- OST-295
- OST-294
- OST-293
- OST-292
- OST-291
- OST-290
- OST-289

Recycle Bin

Austin Cody

in tw f K YouTube

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed Click to add topics

Back to List: Leads

Open Activities [1] | Activity History [1] | SMS Logs [1] | Campaign History [0] | HTML Email Status [0]

Lead Detail

Edit Delete Convert Clone Find Duplicates SMS Chat

Lead Owner [Mark Smith \[Change\]](#) SMS Opt Out ☐

Name Austin Cody Phone

Company CDI Corp. Mobile +19038845202

Title Fax

Lead Source Email

Industry Website

Annual Revenue Lead Status Open - Not Contacted

Rating

No. of Employees

Address 100 MAIN ST
PO BOX 1022
SEATTLE, WA 98104
USA

Product Interest Current Generator(s)

SIC Code Primary

Number of Locations

Created By [Mark Smith](#), 5/18/2015 3:57 AM Last Modified By [Mark Smith](#), 8/10/2015 11:52 PM

Description

Edit Delete Convert Clone Find Duplicates SMS Chat

Open Activities

New Task New Event New Meeting Request Send SMS Open Activities Help

Action	Subject	Task	Due Date	Status	Priority	Assigned To
☐ Edit Cls	New incoming SMS from Austin Cody-+19038845202	✓		In Progress	Normal	TwowaySMS Feature Site Guest User

Activity History

Log a Call Mail Merge Send an Email View All Activity History Help

Action	Subject	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Outgoing message to +19038845202	✓		Mark Smith	8/11/2015 12:04 AM

SMS Logs

New SMS Log SMS Logs Help

Action	SMS Track#
Edit Del	OST-293

USER GUIDE FOR OPEN SMS PRO



i) The screen below shows when the Lead/Contact replies with the specified keyword. The user will reply back with the specified message for 'HELP' (refer to step a).

SMS from (469) 530-2075  Inbox x  



(469) 530-2075 - (19038845282 14095302075 77)-xJbCqx@txt.voice.google.c... 12:51 PM (4 minutes ago) ☆  

to me 

Thank you for replying us back. We are always here to support you. Reply HELP for any help and reply OPTUT / Stop for not receiving any message further.



  (469) 530-2075 (19038845282 14095302075 77)-xJbCqx@txt.voice.google.com)

Help



Send      

Saving  

© AppShark Inc. All rights reserved

4040 McEwen Rd, Suite 340, Dallas, TX 75244

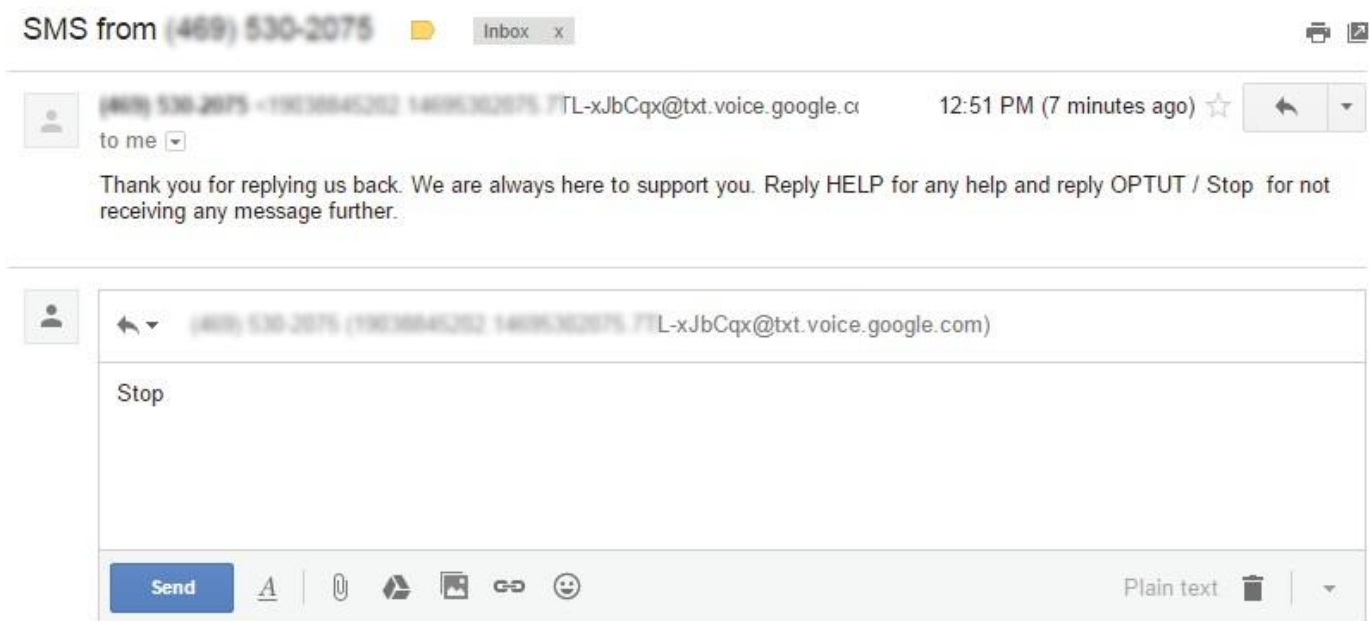
Ph - (214) 269-3461

E - sales@appshark.com

USER GUIDE FOR OPEN SMS PRO



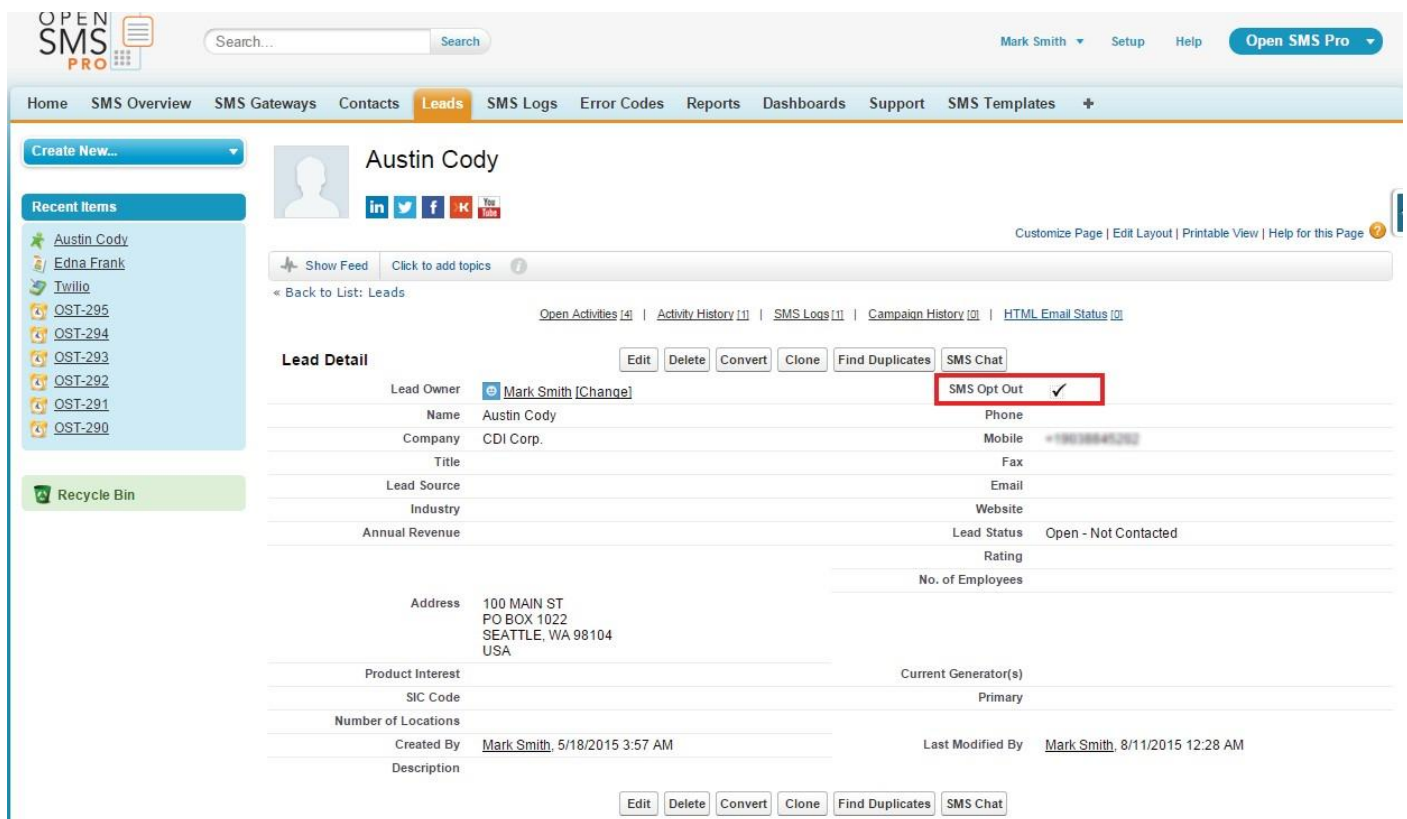
j) To stop receiving messages from open SMS Pro the Lead/Contact has to reply with the Keywords - 'Stop' or 'Opt Out' as shown in the screen below:



USER GUIDE FOR OPEN SMS PRO



k) After the user replies back with specified message for 'STOP' or 'OPT OUT' (refer to step a) the 'SMS Opt Out' checkbox will be automatically checked and the Lead/Contact will stop receiving Messages or Chat requests from the user via Open SMS.



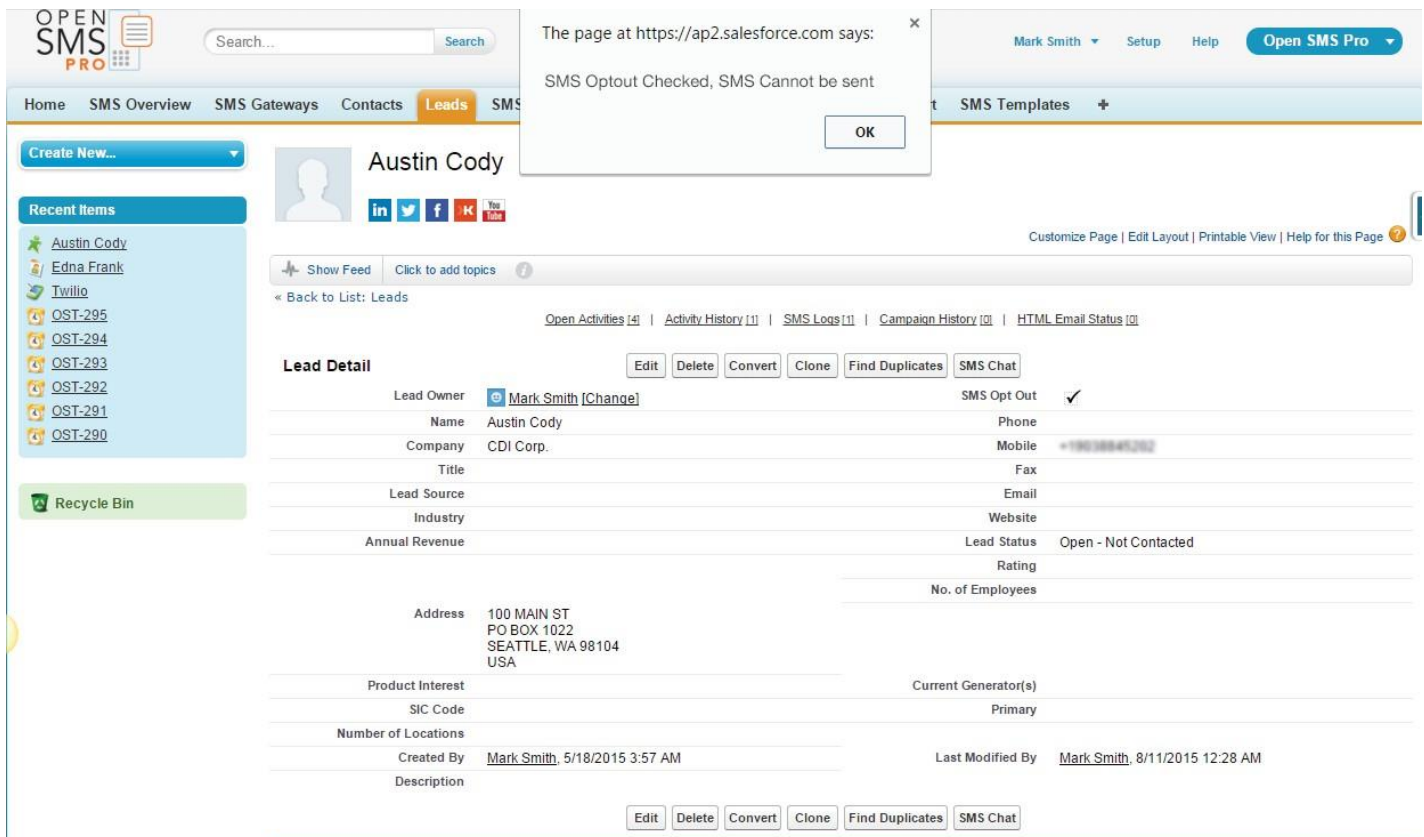
The screenshot displays the 'Lead Detail' page for 'Austin Cody' in the Open SMS Pro application. The interface includes a top navigation bar with links like Home, SMS Overview, SMS Gateways, Contacts, Leads, SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates. A left sidebar shows 'Recent Items' and a 'Recycle Bin'. The main content area shows the lead's profile, including contact information, company details, and a list of activities. The 'SMS Opt Out' checkbox is checked and highlighted with a red box.

Lead Detail	
Lead Owner	Mark Smith [Change]
Name	Austin Cody
Company	CDI Corp.
Title	
Lead Source	
Industry	
Annual Revenue	
Address	100 MAIN ST PO BOX 1022 SEATTLE, WA 98104 USA
Product Interest	
SIC Code	
Number of Locations	
Created By	Mark Smith, 5/18/2015 3:57 AM
Description	
Phone	
Mobile	+19018845292
Fax	
Email	
Website	
Lead Status	Open - Not Contacted
Rating	
No. of Employees	
Current Generator(s)	Primary
Last Modified By	Mark Smith, 8/11/2015 12:28 AM

USER GUIDE FOR OPEN SMS PRO



l) If the user tries to send an SMS to a Lead or Contact who is already listed under the 'SMS Opt Out' category, the following alert will be displayed



The page at https://ap2.salesforce.com says:

SMS Optout Checked, SMS Cannot be sent

OK

Lead Detail

Lead Owner: Mark Smith [Change]

Name: Austin Cody

Company: CDI Corp.

Title:

Lead Source:

Industry:

Annual Revenue:

Address: 100 MAIN ST
PO BOX 1022
SEATTLE, WA 98104
USA

Product Interest:

SIC Code:

Number of Locations:

Created By: Mark Smith, 5/18/2015 3:57 AM

Description:

SMS Opt Out: ☒

Phone:

Mobile: +190388847262

Fax:

Email:

Website:

Lead Status: Open - Not Contacted

Rating:

No. of Employees:

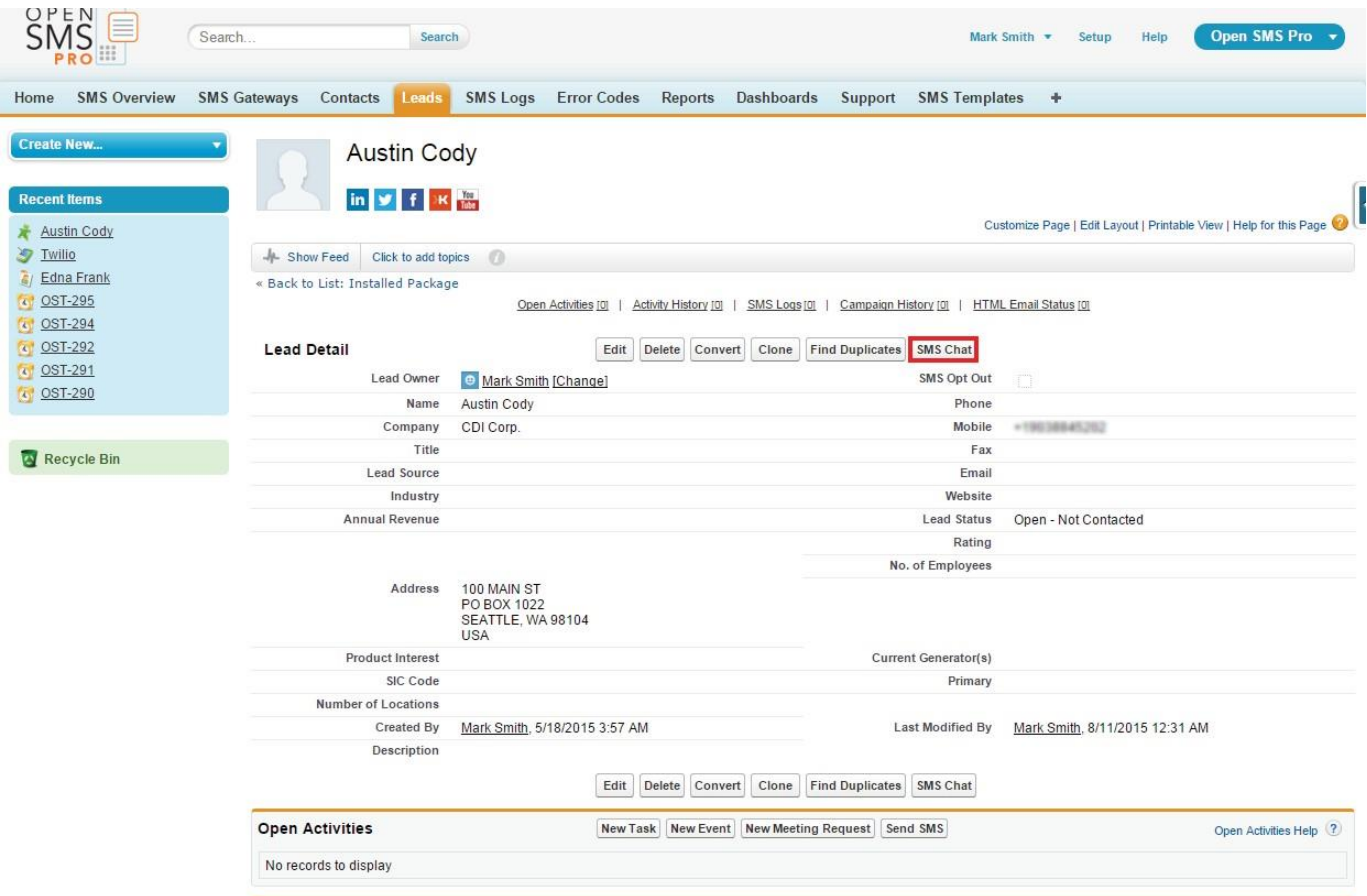
Current Generator(s):

Primary:

Last Modified By: Mark Smith, 8/11/2015 12:28 AM

How to connect with leads using the SMS Chat feature

a) Click on the 'Leads' tab in Salesforce and choose any 'Lead' to view their details page. Click on the 'SMS Chat' button to initiate a conversation with the lead.



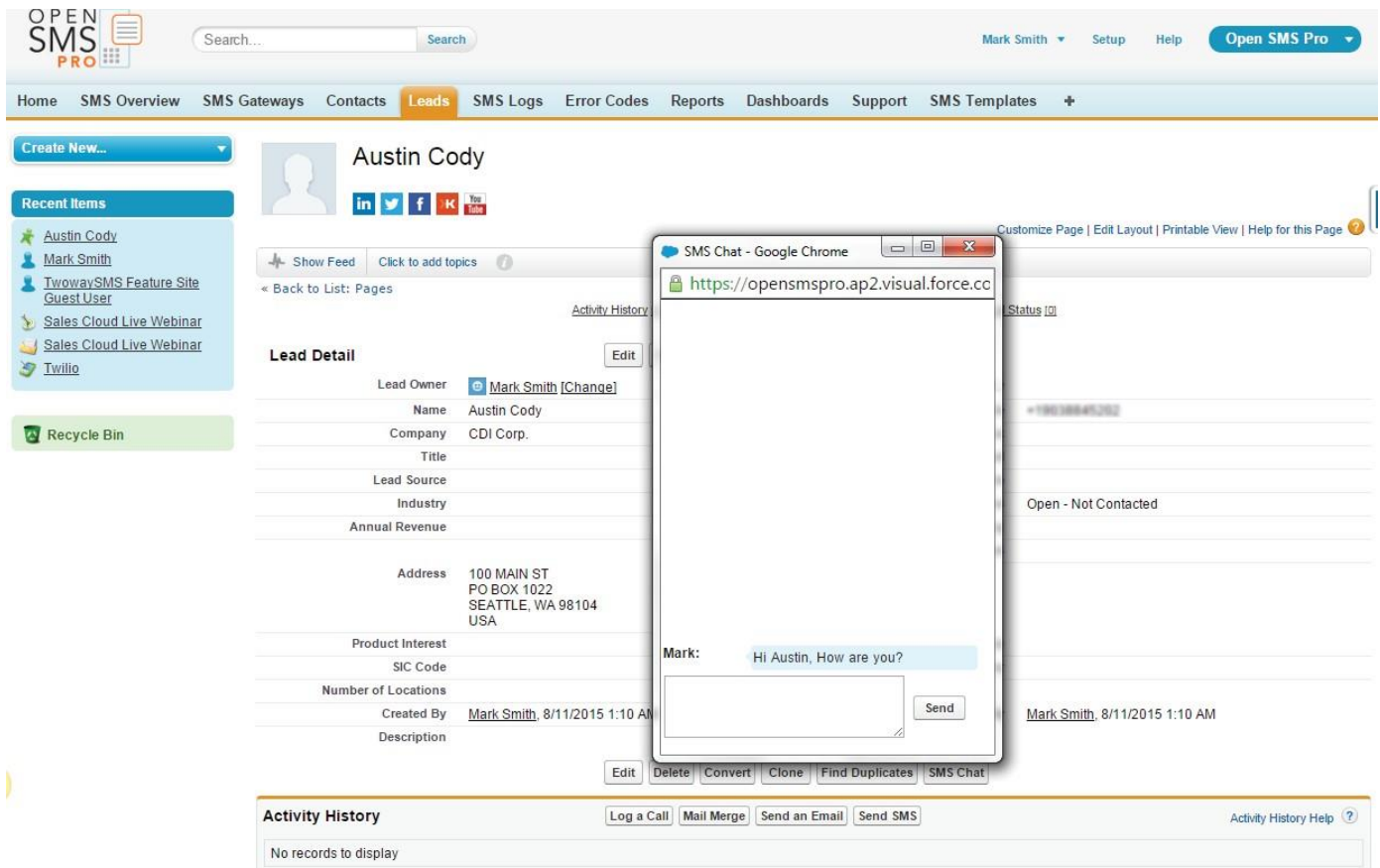
The screenshot displays the Open SMS Pro interface within a Salesforce-like environment. The top navigation bar includes a search bar, user profile (Mark Smith), and links for Setup, Help, and Open SMS Pro. The main navigation menu shows tabs for Home, SMS Overview, SMS Gateways, Contacts, Leads (selected), SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates. On the left, there's a 'Recent Items' list with entries like Austin Cody, Twilio, Edna Frank, and several OST-295, OST-292, OST-291, and OST-290. Below this is a 'Recycle Bin' link.

The central area shows the 'Lead Detail' page for 'Austin Cody'. The lead's profile includes social media links (LinkedIn, Twitter, Facebook, YouTube) and a 'Show Feed' button. Below the profile, there's a 'Back to List: Installed Package' link and a row of links for Open Activities, Activity History, SMS Logs, Campaign History, and HTML Email Status. The 'Lead Detail' section has buttons for Edit, Delete, Convert, Clone, Find Duplicates, and SMS Chat (highlighted with a red box). The lead's information is organized into two columns: Lead Owner (Mark Smith), Name (Austin Cody), Company (CDI Corp.), Title, Lead Source, Industry, Annual Revenue, Address (100 MAIN ST, PO BOX 1022, SEATTLE, WA 98104, USA), Product Interest, SIC Code, Number of Locations, Created By (Mark Smith, 5/18/2015 3:57 AM), and Description. The second column includes SMS Opt Out, Phone, Mobile (+19838845262), Fax, Email, Website, Lead Status (Open - Not Contacted), Rating, No. of Employees, Current Generator(s) (Primary), and Last Modified By (Mark Smith, 8/11/2015 12:31 AM). At the bottom, there's an 'Open Activities' section with buttons for New Task, New Event, New Meeting Request, and Send SMS, and a link to Open Activities Help.

USER GUIDE FOR OPEN SMS PRO



b) Once the user clicks on the 'SMS Chat' button, a pop-up window opens where the user can begin typing.



The screenshot shows the Open SMS Pro web application. At the top is a navigation bar with links like Home, SMS Overview, SMS Gateways, Contacts, Leads (active), SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates. A search bar and user profile (Mark Smith) are also present. On the left, a sidebar shows 'Recent Items' including Austin Cody, Mark Smith, and various webinars. The main content area displays the 'Lead Detail' for Austin Cody, including contact information and a list of activities. A pop-up window titled 'SMS Chat - Google Chrome' is overlaid on the lead detail, showing a chat interface with a message from Mark: 'Hi Austin, How are you?' and a 'Send' button. The background interface also includes an 'Activity History' section at the bottom.

USER GUIDE FOR OPEN SMS PRO



c) A transcript of the chat message sent by the user and the reply received from the Lead is shown below:

SMS from (469) 530-2075  Inbox x  

 (469) 530-2075 <(469)5302075@txt.voice.google.com> 3:47 PM (3 minutes ago) ☆  
to me ▾
Mark Smith@Appshark Software:Hi Austin, How are you?

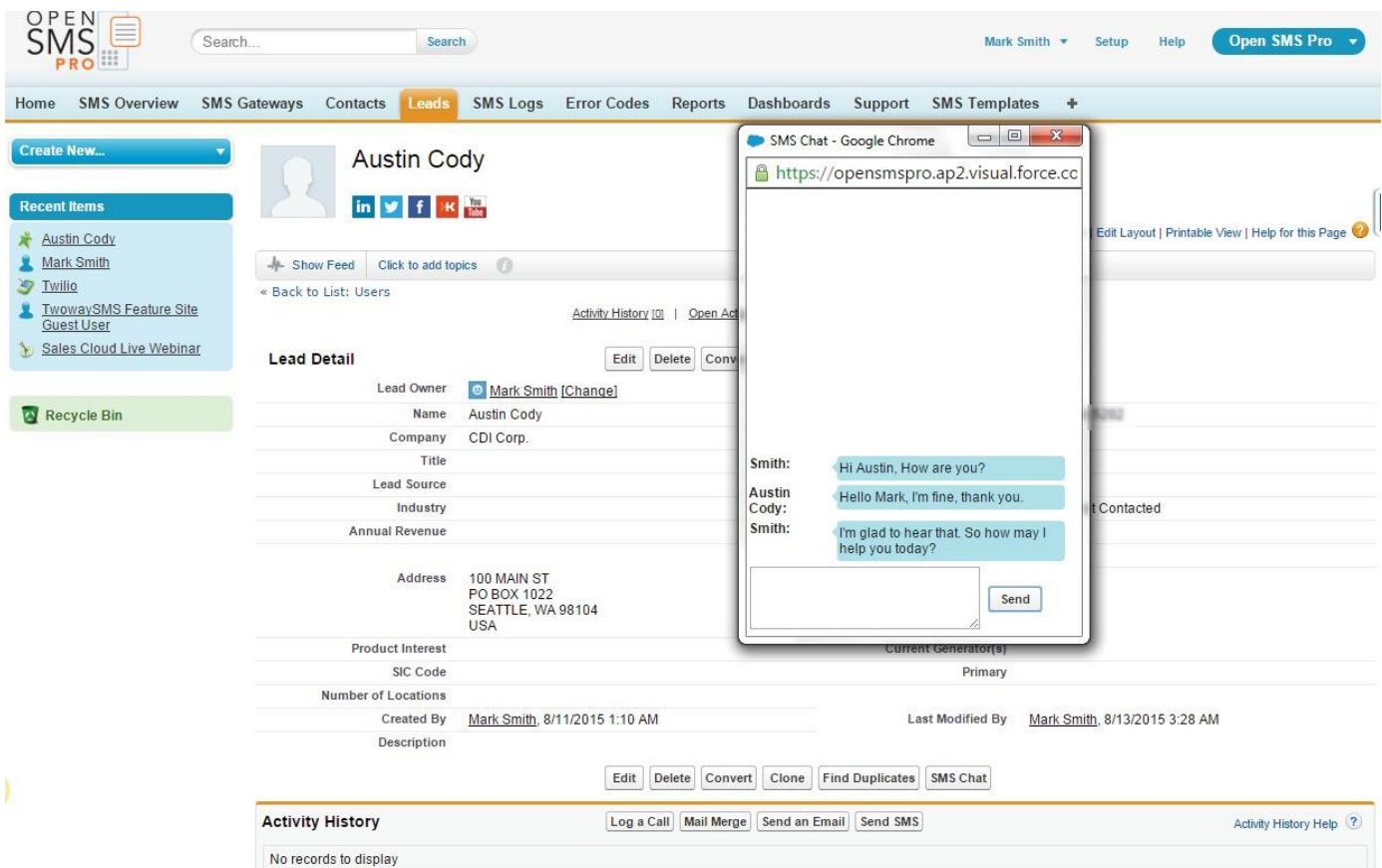
  (469) 530-2075 <(469)5302075@txt.voice.google.com>
Hello Mark, I'm fine, thank you.

       Saved  

USER GUIDE FOR OPEN SMS PRO



d) Using the open chat window, the user can continue the conversation as shown below:



The screenshot displays the Open SMS Pro web application interface. The top navigation bar includes a search bar, user profile (Mark Smith), and links for Setup, Help, and Open SMS Pro. The main menu contains various sections like Home, SMS Overview, SMS Gateways, Contacts, Leads (highlighted), SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates.

The central area shows the profile of a lead named **Austin Cody**. The profile includes social media links (LinkedIn, Twitter, Facebook, YouTube), a "Show Feed" button, and a "Click to add topics" link. Below this is the "Lead Detail" section, which contains fields for Lead Owner (Mark Smith), Name (Austin Cody), Company (CDI Corp.), Title, Lead Source, Industry, Annual Revenue, Address (100 MAIN ST, PO BOX 1022, SEATTLE, WA 98104, USA), Product Interest, SIC Code, Number of Locations, Created By (Mark Smith, 8/11/2015 1:10 AM), and Last Modified By (Mark Smith, 8/13/2015 3:28 AM). Action buttons for Edit, Delete, Convert, Clone, Find Duplicates, and SMS Chat are visible.

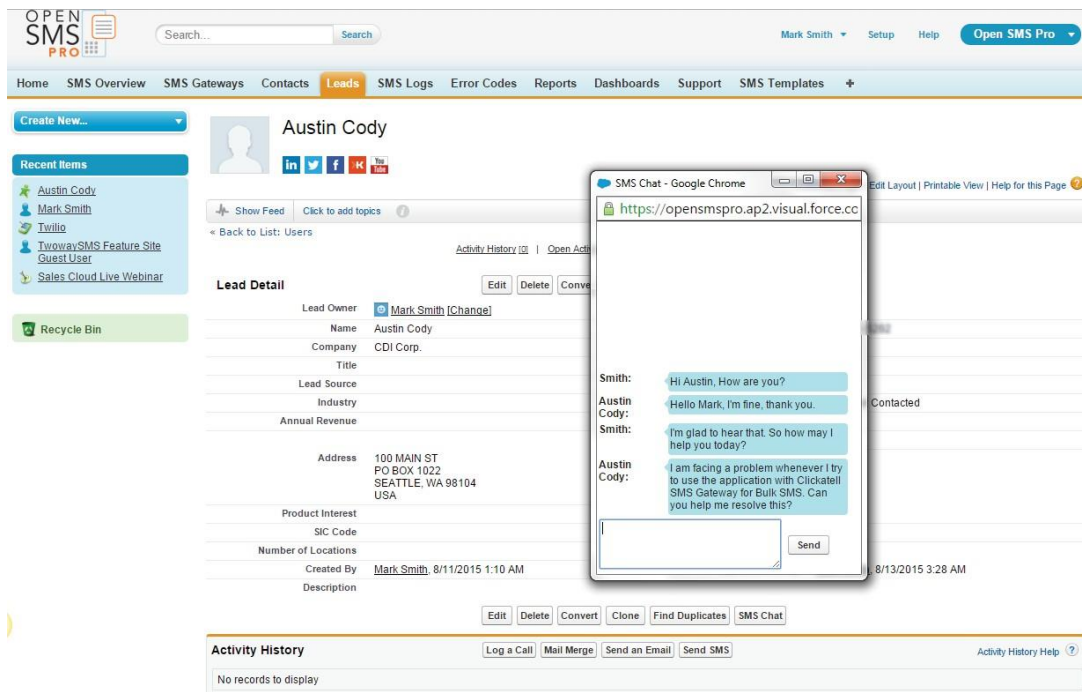
An "SMS Chat" window is open, showing a conversation between Mark Smith and Austin Cody. The chat messages are:

- Smith: Hi Austin, How are you?
- Austin Cody: Hello Mark, I'm fine, thank you.
- Smith: I'm glad to hear that. So how may I help you today?

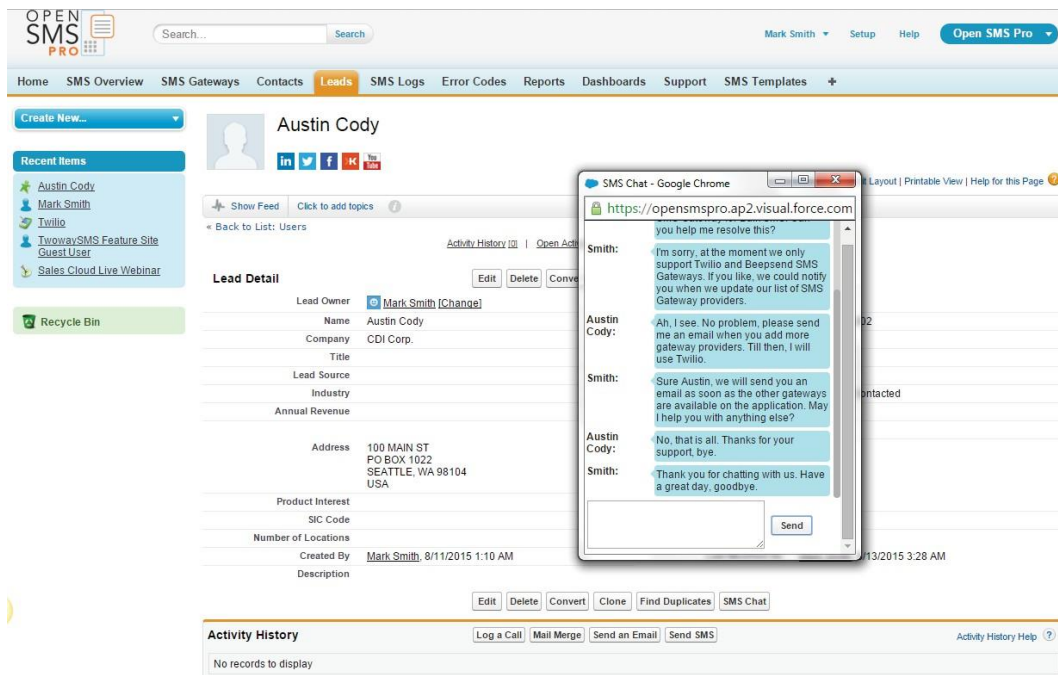
 The chat window has a "Send" button at the bottom right.

At the bottom, there is an "Activity History" section with buttons for Log a Call, Mail Merge, Send an Email, and Send SMS. It currently shows "No records to display".

USER GUIDE FOR OPEN SMS PRO

The screenshot shows the Open SMS Pro web application interface. The top navigation bar includes links for Home, SMS Overview, SMS Gateways, Contacts, Leads, SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates. The main content area displays the Lead Detail for Austin Cody, including fields for Name, Company, Title, Lead Source, Industry, Annual Revenue, Address, Product Interest, SIC Code, Number of Locations, and Created By. An SMS chat window is overlaid on the right side of the page, showing a conversation between Mark Smith and Austin Cody. The chat window title is "SMS Chat - Google Chrome" and the URL is "https://opensmspro.ap2.visual.force.cc".



This screenshot shows the same Open SMS Pro web application interface as the previous one, but with a different SMS chat conversation overlaid. The chat window title is "SMS Chat - Google Chrome" and the URL is "https://opensmspro.ap2.visual.force.com". The conversation shows Mark Smith asking for help with a problem, and Austin Cody responding with a detailed explanation of the issue and a solution. The chat window also includes a "Send" button and a "Log a Call" button.

USER GUIDE FOR OPEN SMS PRO



e) The user can check the recorded chat conversation in the 'Activity History' section on the Lead details page.

OPEN SMS PRO

Search... Search

Mark Smith Setup Help Open SMS Pro

Home SMS Overview SMS Gateways Contacts **Leads** SMS Logs Error Codes Reports Dashboards Support SMS Templates +

Create New...

Recent Items

- Austin Cody
- Twilio
- Edna Frank
- OST-295
- OST-294
- OST-292
- OST-291

Recycle Bin

Austin Cody

in Twitter Facebook LinkedIn YouTube

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed Click to add topics

Open Activities (0) Activity History (1) SMS Logs (0) Campaign History (0) HTML Email Status (0)

Lead Detail Edit Delete Convert Clone Find Duplicates SMS Chat

Lead Owner Mark Smith [Change] SMS Opt Out

Name Austin Cody Phone

Company CDI Corp. Mobile +1980388452752

Title Fax

Lead Source Email

Industry Website

Annual Revenue Lead Status Open - Not Contacted

Rating

No. of Employees

Address 100 MAIN ST
PO BOX 1022
SEATTLE, WA 98104
USA

Product Interest Current Generator(s)

SIC Code Primary

Number of Locations

Created By Mark Smith, 8/11/2015 1:10 AM Last Modified By Mark Smith, 8/11/2015 1:10 AM

Description

Edit Delete Convert Clone Find Duplicates SMS Chat

Open Activities New Task New Event New Meeting Request Send SMS Open Activities Help

No records to display

Activity History Log a Call Mail Merge Send an Email View All Activity History Help

Action	Subject	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Chat Conversation with Austin Cody	✓		Mark Smith	8/11/2015 1:19 AM

USER GUIDE FOR OPEN SMS PRO



f) Here is a transcript of the chat conversation stored in the 'Activity History' section along with other details:



Mark Smith ▾
Setup
Help
Open SMS PRO ▾

Home
SMS Overview
SMS Gateways
Contacts
Leads
SMS Logs
Error Codes
Reports
Dashboards
Support
SMS Templates
+

Create New... ▾

Recent Items

- Austin Cody
- Mark Smith
- Twilio
- TwilioSMS Feature Site
- Guest User
- Sales Cloud Live Webinar

Recycle Bin

Task

Chat Conversation with Austin Cody

Click to add topics ⓘ

1 7 31

Back to List: Custom Object Definitions

Attachments ⓘ

Edit
Delete
Create Follow-Up Task
Create Follow-Up Event

Assigned To	Mark Smith	Status	Completed
Subject	Chat Conversation with Austin Cody		Name
Due Date		Related To	Austin Cody, CDI Corp.
Phone		Email	
Priority	Normal		
Created By	Mark Smith, 8/13/2015 4:07 AM	Last Modified By	Mark Smith, 8/13/2015 4:07 AM
Comments	Smith:Hi Austin, How are you? Austin Cody:Hello Mark, I'm fine, thank you. Smith:I'm glad to hear that. So how may I help you today? Austin Cody:I am facing a problem whenever I try to use the application with Clickatell SMS Gateway for Bulk SMS. Can you help me resolve this? Smith:I'm sorry, at the moment we only support Twilio and Beepsend SMS Gateways. If you like, we could notify you when we update our list of SMS Gateway providers. Austin Cody:Ah, I see. No problem, please send me an email when you add more gateway providers. Till then, I will use Twilio. Smith:Sure Austin, we will send you an email as soon as the other gateways are available on the application. May I help you with anything else? Austin Cody:No, that is all. Thanks for your support, bye. Smith:Thank you for chatting with us. Have a great day, goodbye.		

Reminder

Reminder
☐

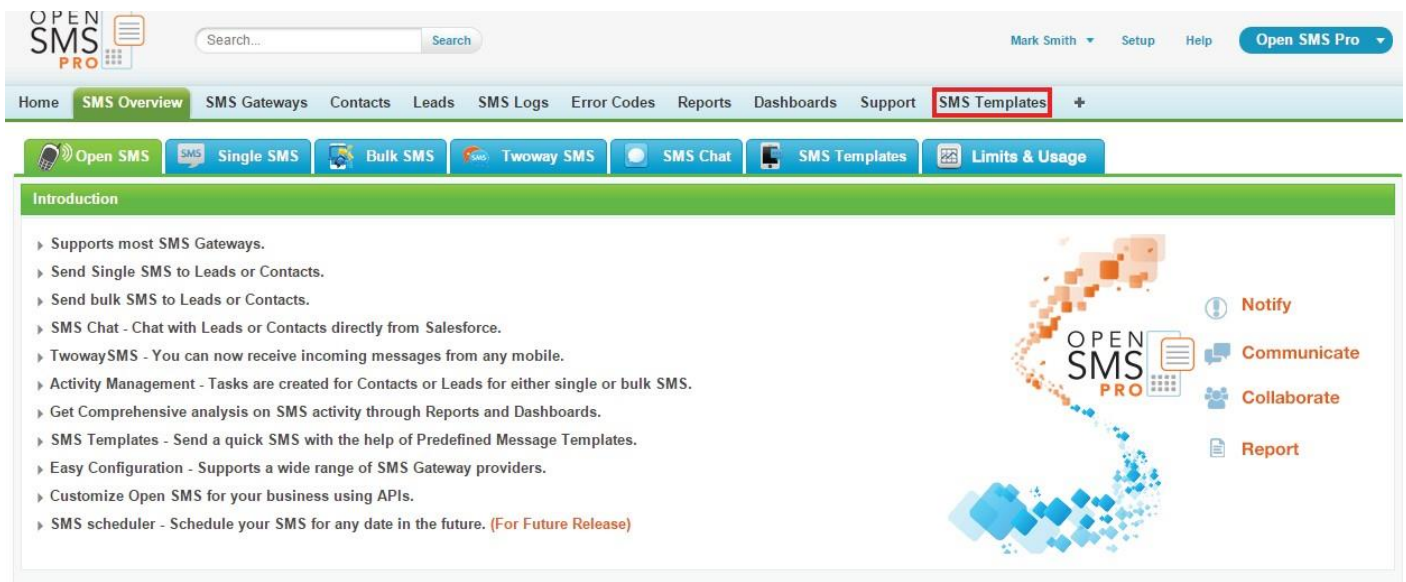
Edit
Delete
Create Follow-Up Task
Create Follow-Up Event

USER GUIDE FOR OPEN SMS PRO

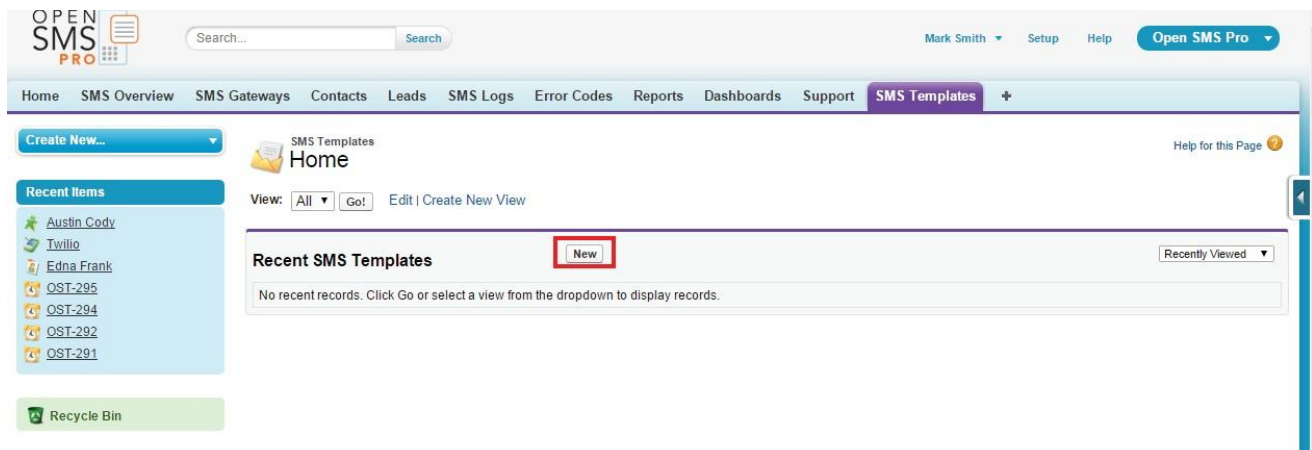


SMS Template

a) After installing the 'Open SMS Pro' application, you will notice that the 'SMS Templates' tab has been added. Click on the tab to create a new message template.



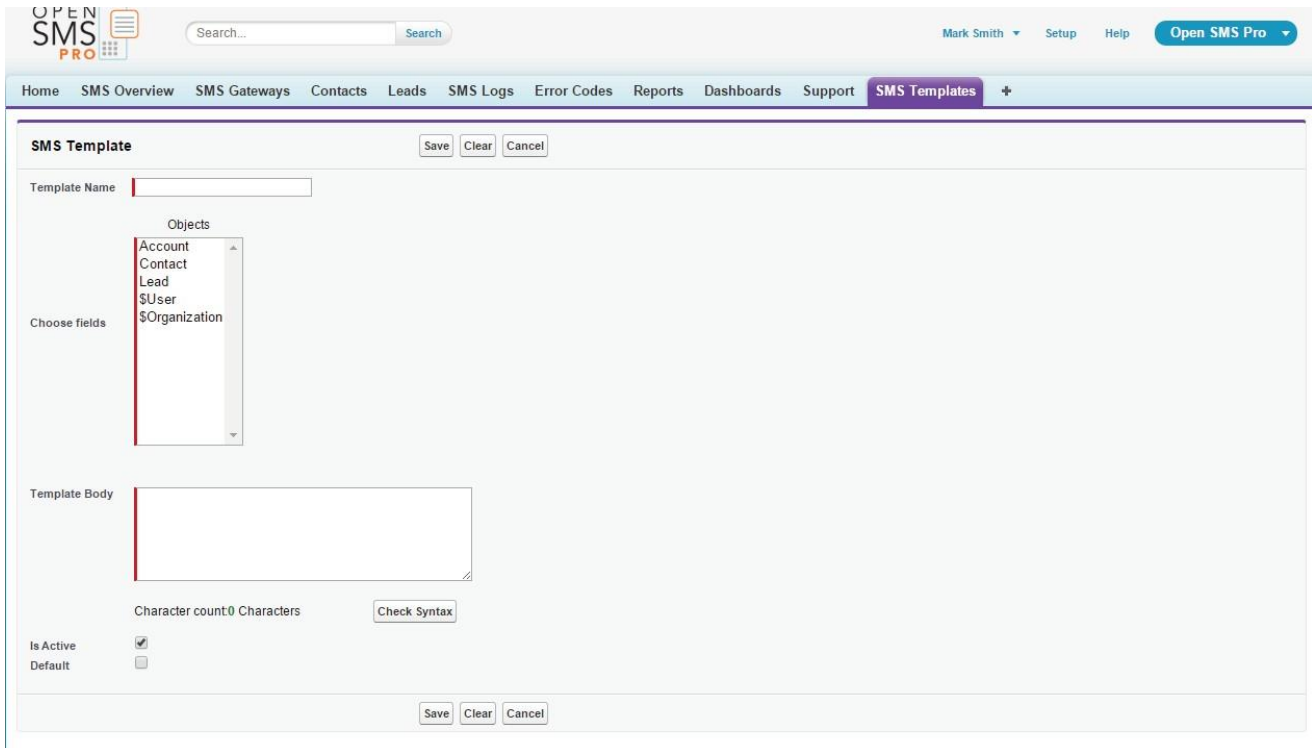
b) After clicking on the 'SMS template' tab, you will be directed to a new page as shown in the screen below. On this page, click on the 'New' button to create SMS Templates.



USER GUIDE FOR OPEN SMS PRO



c) After clicking on the 'New' button, the user is directed to the page shown below to create the message template. The user can select only one field at a time including Organization and User for a single template. Multiple field objects cannot be added to the Template body.



The screenshot shows the 'SMS Template' creation interface in the Open SMS PRO application. The page has a header with the application logo, a search bar, and user information (Mark Smith, Setup, Help, Open SMS Pro). A navigation menu includes Home, SMS Overview, SMS Gateways, Contacts, Leads, SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates (active). The main form area is titled 'SMS Template' and contains the following fields and controls:

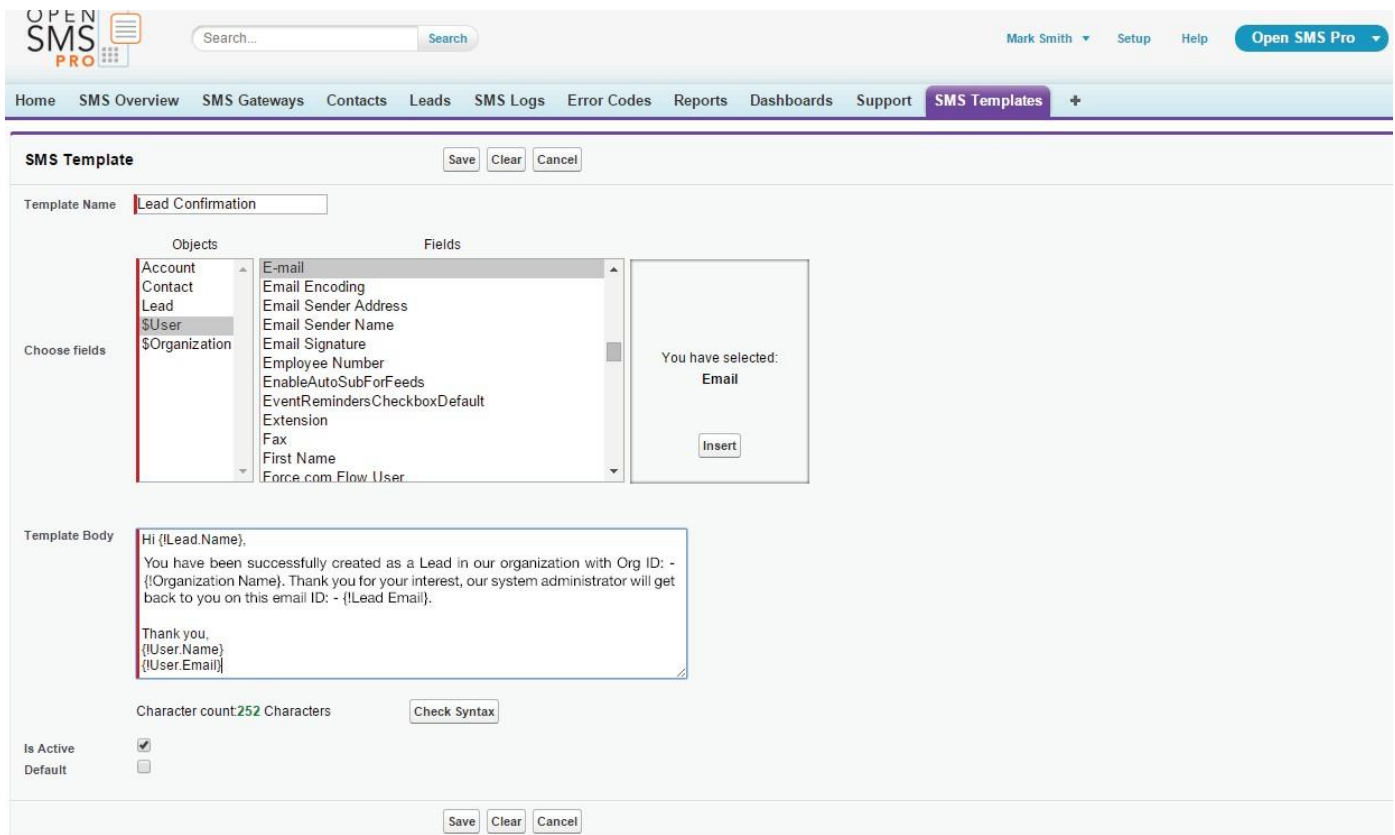
- Template Name:** A text input field.
- Objects:** A list box containing 'Account', 'Contact', 'Lead', '\$User', and '\$Organization'.
- Choose fields:** A label next to the Objects list box.
- Template Body:** A large text area for the message content.
- Character count:** A label showing '0 Characters' and a 'Check Syntax' button.
- Is Active:** A checkbox that is currently checked.
- Default:** A checkbox that is currently unchecked.

At the bottom of the form, there are 'Save', 'Clear', and 'Cancel' buttons.

USER GUIDE FOR OPEN SMS PRO



d) As shown in the screen shot below, the user has to insert the required fields and then click on the 'Save' button to create a message template.



The screenshot shows the 'SMS Template' creation interface in the Open SMS Pro application. The interface includes a top navigation bar with a search bar, user name 'Mark Smith', and links for 'Setup', 'Help', and 'Open SMS Pro'. Below the navigation bar is a menu with options: Home, SMS Overview, SMS Gateways, Contacts, Leads, SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates (which is currently selected). The main content area is titled 'SMS Template' and contains the following elements:

- Template Name:** A text field containing 'Lead Confirmation'.
- Choose fields:** A section with two columns: 'Objects' and 'Fields'.
 - Objects:** A list box containing 'Account', 'Contact', 'Lead', '\$User' (which is selected), and '\$Organization'.
 - Fields:** A list box containing various email-related fields such as 'E-mail', 'Email Encoding', 'Email Sender Address', 'Email Sender Name', 'Email Signature', 'Employee Number', 'EnableAutoSubForFeeds', 'EventRemindersCheckboxDefault', 'Extension', 'Fax', 'First Name', and 'Force.com.Flow.User'.
 - You have selected:** A box showing 'Email' with an 'Insert' button.
- Template Body:** A text area containing the following text:


```
Hi {Lead.Name},
You have been successfully created as a Lead in our organization with Org ID: -
{Organization Name}. Thank you for your interest, our system administrator will get
back to you on this email ID: - {Lead Email}.

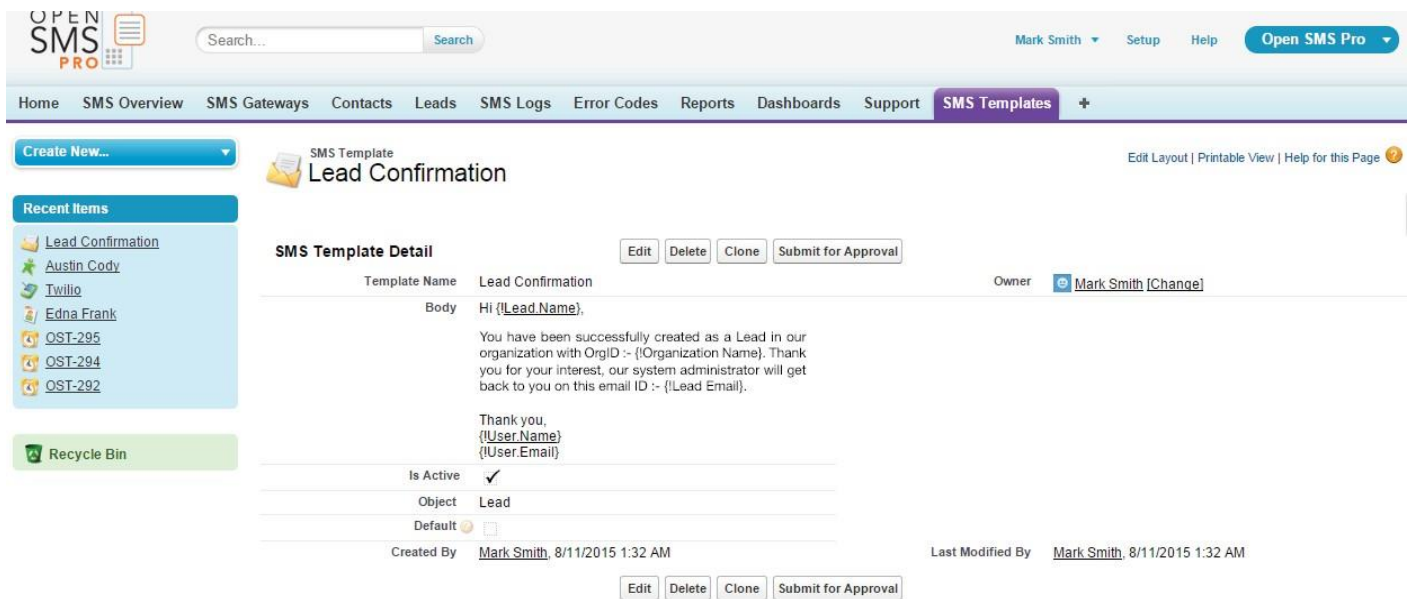
Thank you,
{User.Name}
{User.Email}
```
- Character count:** A label showing '252 Characters'.
- Check Syntax:** A button to validate the template syntax.
- Is Active:** A checkbox that is currently checked.
- Default:** A checkbox that is currently unchecked.

At the bottom of the form are 'Save', 'Clear', and 'Cancel' buttons.

USER GUIDE FOR OPEN SMS PRO



e) After clicking on the 'Save' button the user is taken to another page, where, based on the field value, the 'SMS Template Detail' is displayed as shown in the screenshot below.



The screenshot shows the 'SMS Template Detail' page for a template named 'Lead Confirmation'. The page includes a sidebar with 'Recent Items' and a main content area with fields for Template Name, Body, Is Active, Object, Default, Created By, and Last Modified By. The 'Body' field contains a message template with placeholders for Lead Name, Organization Name, and User Name/Email. The 'Is Active' field is checked, and the 'Object' is set to 'Lead'.

OPEN SMS PRO

Search... Search

Mark Smith Setup Help Open SMS Pro

Home SMS Overview SMS Gateways Contacts Leads SMS Logs Error Codes Reports Dashboards Support **SMS Templates**

Create New...

Recent Items

- Lead Confirmation
- Austin Cody
- Twilio
- Edna Frank
- OST-295
- OST-294
- OST-292

Recycle Bin

SMS Template
Lead Confirmation

Edit Layout | Printable View | Help for this Page

SMS Template Detail Edit Delete Clone Submit for Approval

Template Name Lead Confirmation Owner Mark Smith [Change]

Body

Hi {Lead Name},

You have been successfully created as a Lead in our organization with OrgID :- {Organization Name}. Thank you for your interest, our system administrator will get back to you on this email ID :- {Lead Email}.

Thank you,
{User Name}
{User Email}

Is Active ☒

Object Lead

Default ☐

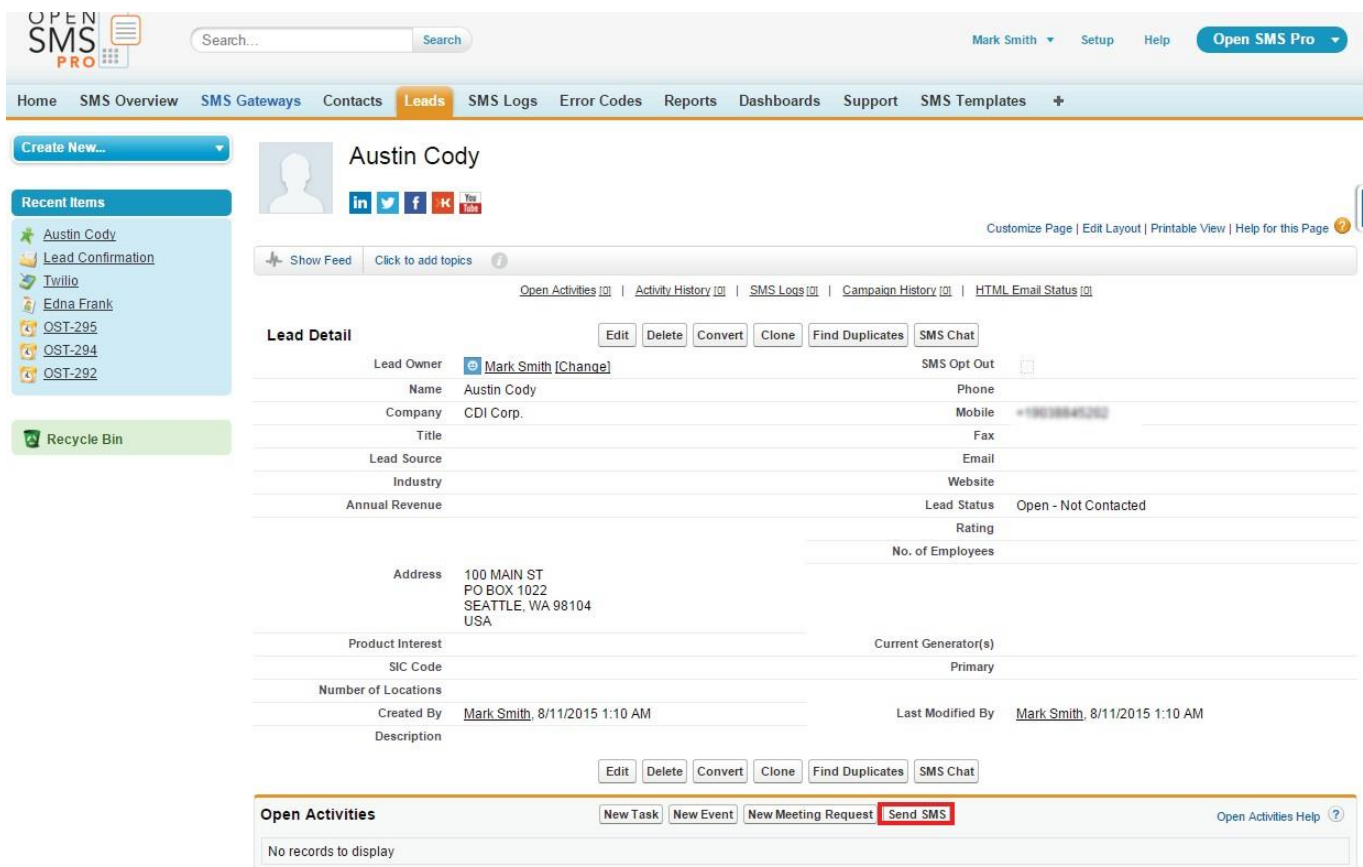
Created By Mark Smith, 8/11/2015 1:32 AM Last Modified By Mark Smith, 8/11/2015 1:32 AM

Edit Delete Clone Submit for Approval

USER GUIDE FOR OPEN SMS PRO



f) Once the 'SMS Template' is created, click on the 'Leads' or 'Contacts' tab and then click on the 'Send SMS' button as shown in the screen shot below.

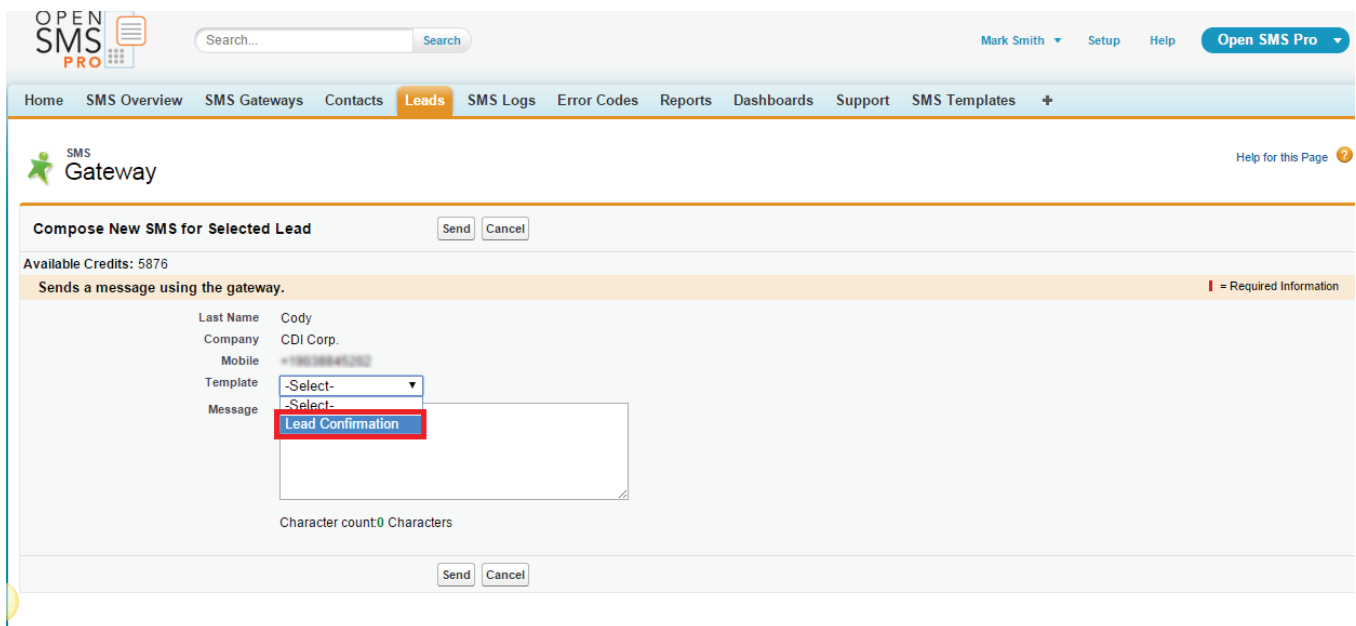


The screenshot displays the Open SMS Pro web application interface. The top navigation bar includes a search bar, user profile (Mark Smith), and links for Setup, Help, and Open SMS Pro. The main navigation menu lists various sections: Home, SMS Overview, SMS Gateways, Contacts, Leads (selected), SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates. On the left sidebar, there is a 'Create New...' button, a 'Recent Items' list (including Austin Cody, Lead Confirmation, Twilio, Edna Frank, and OST-295), and a 'Recycle Bin' button. The main content area shows the 'Lead Detail' for 'Austin Cody'. The lead owner is 'Mark Smith'. The lead's contact information includes a name, company (CDI Corp.), title, lead source, industry, annual revenue, address (100 MAIN ST, PO BOX 1022, SEATTLE, WA 98104, USA), product interest, SIC code, number of locations, and current generator(s). The lead status is 'Open - Not Contacted'. The 'Open Activities' section at the bottom shows a list of activities with a 'Send SMS' button highlighted in red. The 'Send SMS' button is located in the 'Open Activities' section, which also includes buttons for 'New Task', 'New Event', 'New Meeting Request', and 'Send SMS'. The 'Send SMS' button is highlighted in red.

USER GUIDE FOR OPEN SMS PRO



g) As shown in the screen below, the user can select the 'Template' from the dropdown to populate the Message body.



Compose New SMS for Selected Lead [Send] [Cancel]

Available Credits: 5876

Sends a message using the gateway. ! = Required Information

Last Name	Cody
Company	CDI Corp.
Mobile	+1988845252
Template	-Select-
Message	-Select-

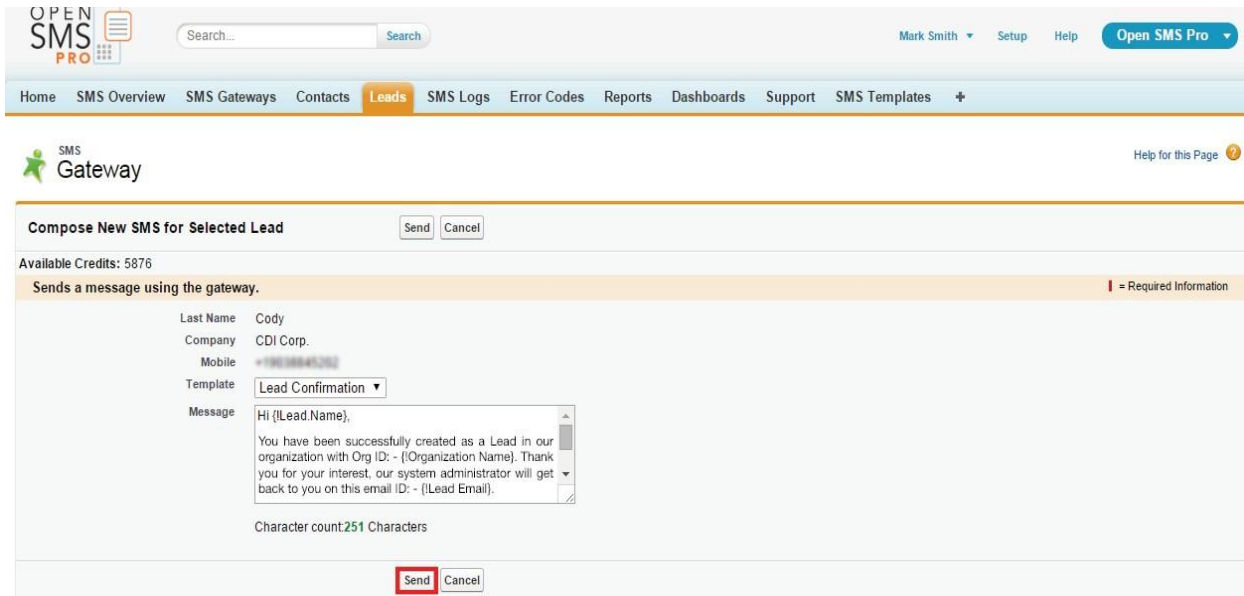
Lead Confirmation

Character count: 0 Characters

[Send] [Cancel]

USER GUIDE FOR OPEN SMS PRO

h) After selecting the 'Template,' the user can view the entire message of that template in the body. After reviewing the message the user can click on the 'Send' button.



Compose New SMS for Selected Lead [Send] [Cancel]

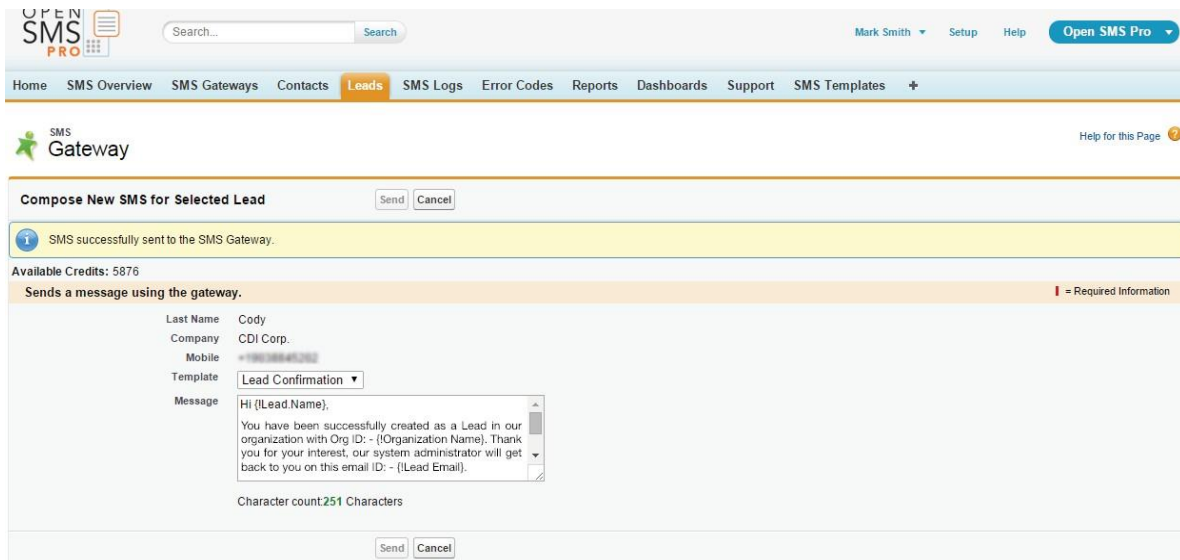
Available Credits: 5876

Sends a message using the gateway. ⓘ = Required Information

Last Name: Cody
Company: CDI Corp.
Mobile: +19038846292
Template: Lead Confirmation
Message: Hi {Lead.Name},
You have been successfully created as a Lead in our organization with Org ID: - {Organization Name}. Thank you for your interest, our system administrator will get back to you on this email ID: - {Lead Email}.
Character count: 251 Characters

[Send] [Cancel]

i) If the message is delivered, the user gets a notification 'SMS successfully sent to the SMS Gateway'.



Compose New SMS for Selected Lead [Send] [Cancel]

ⓘ SMS successfully sent to the SMS Gateway.

Available Credits: 5876

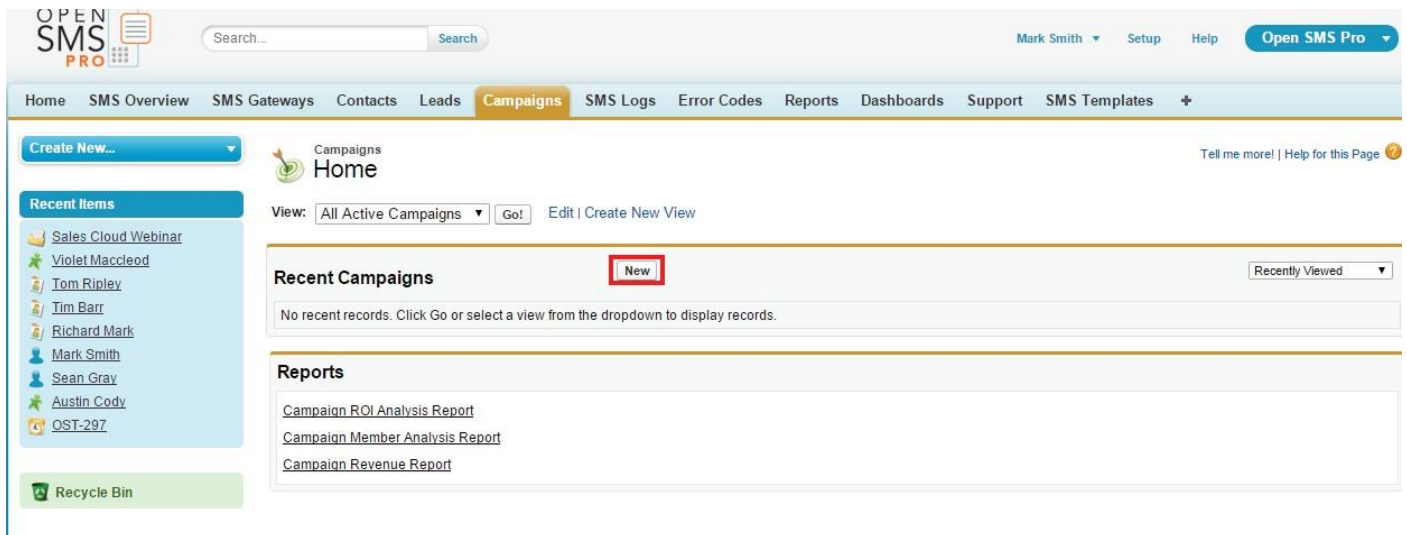
Sends a message using the gateway. ⓘ = Required Information

Last Name: Cody
Company: CDI Corp.
Mobile: +19038846292
Template: Lead Confirmation
Message: Hi {Lead.Name},
You have been successfully created as a Lead in our organization with Org ID: - {Organization Name}. Thank you for your interest, our system administrator will get back to you on this email ID: - {Lead Email}.
Character count: 251 Characters

[Send] [Cancel]

Message Sending on Campaign

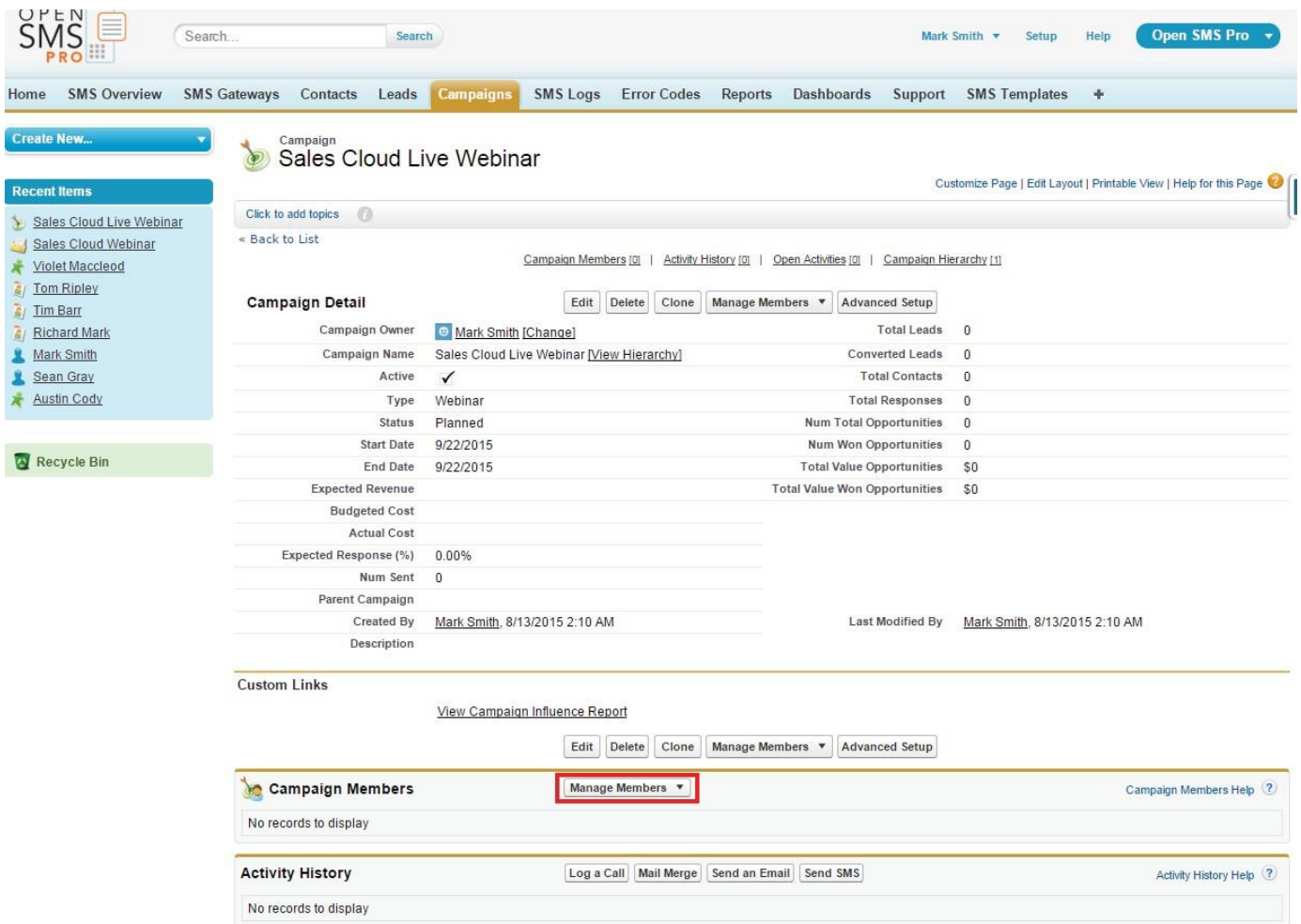
- a) Click on the 'Campaigns' tab and then under the 'Recent Campaigns' section click on the 'New' button.



The screenshot displays the Open SMS Pro web application interface. The top navigation bar includes a search bar, user profile (Mark Smith), and links for Setup, Help, and Open SMS Pro. The main navigation menu features tabs for Home, SMS Overview, SMS Gateways, Contacts, Leads, Campaigns (highlighted), SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates. The left sidebar contains a 'Create New...' button, a 'Recent Items' list with links to various users and documents, and a 'Recycle Bin' button. The main content area shows the 'Campaigns' section with a 'Home' link and a 'View:' dropdown set to 'All Active Campaigns'. A 'New' button is highlighted in the 'Recent Campaigns' section. Below this, there is a message: 'No recent records. Click Go or select a view from the dropdown to display records.' The 'Reports' section lists three reports: 'Campaign ROI Analysis Report', 'Campaign Member Analysis Report', and 'Campaign Revenue Report'.

USER GUIDE FOR OPEN SMS PRO

b) On the campaign event page that opens, in the 'Campaign Members' section, click on 'Manage Members.'



The screenshot displays the Open SMS Pro web application interface. The top navigation bar includes a search bar, user profile (Mark Smith), and links for Setup and Help. The main navigation menu lists various sections: Home, SMS Overview, SMS Gateways, Contacts, Leads, Campaigns (highlighted), SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates. A left sidebar shows 'Recent Items' with a list of recent campaigns and contacts, and a 'Recycle Bin' link.

The 'Campaigns' section is active, showing the 'Sales Cloud Live Webinar' campaign details. The 'Campaign Detail' section includes a table with various metrics:

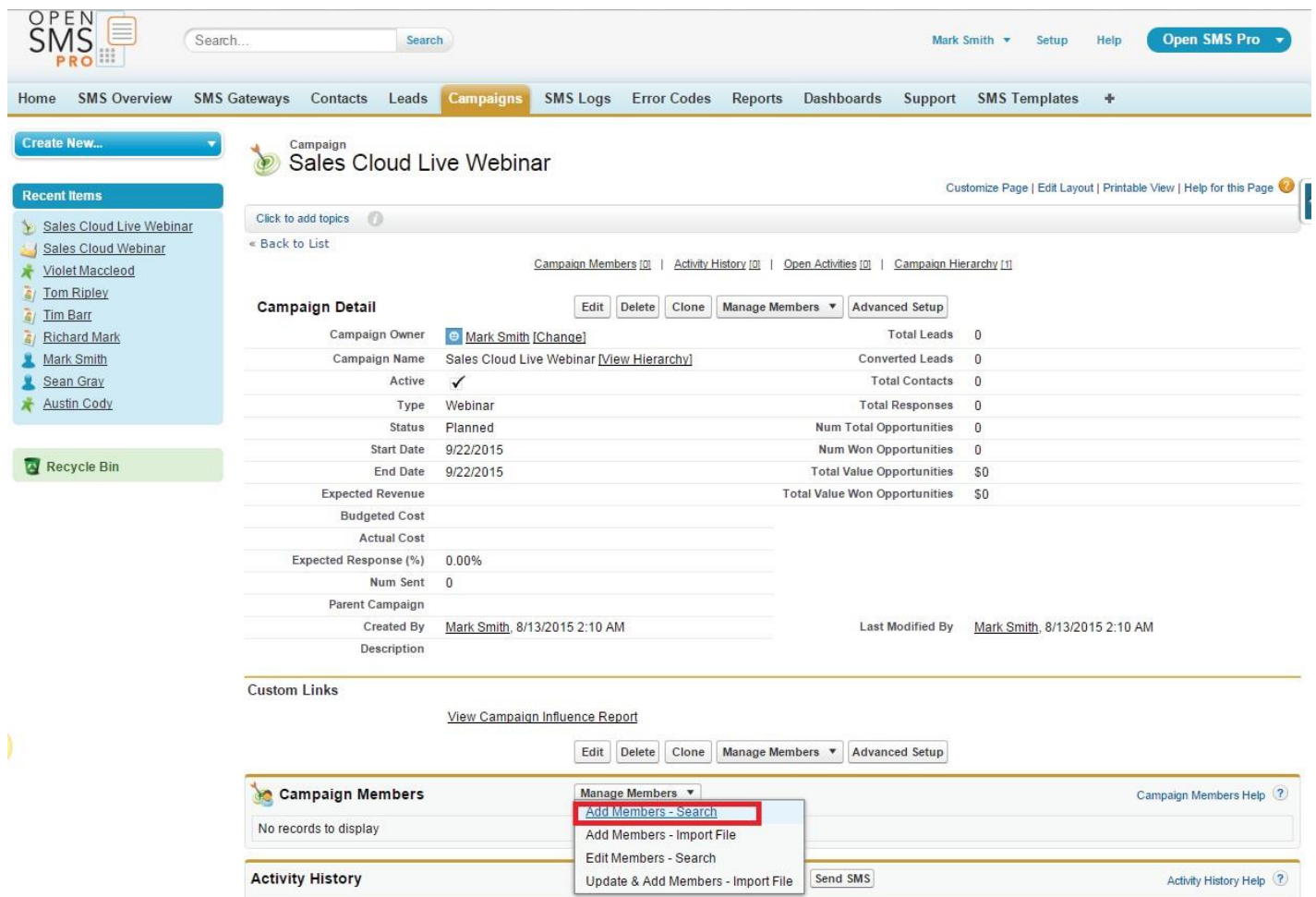
Campaign Detail		Edit	Delete	Clone	Manage Members	Advanced Setup
Campaign Owner	Mark Smith [Change]					
Campaign Name	Sales Cloud Live Webinar [View Hierarchy]					
Active	☒					
Type	Webinar					
Status	Planned					
Start Date	9/22/2015					
End Date	9/22/2015					
Expected Revenue						
Budgeted Cost						
Actual Cost						
Expected Response (%)	0.00%					
Num Sent	0					
Parent Campaign						
Created By	Mark Smith, 8/13/2015 2:10 AM					
Description						
Total Leads	0					
Converted Leads	0					
Total Contacts	0					
Total Responses	0					
Num Total Opportunities	0					
Num Won Opportunities	0					
Total Value Opportunities	\$0					
Total Value Won Opportunities	\$0					

Below the campaign details, there is a 'Custom Links' section with a link to 'View Campaign Influence Report'. The 'Campaign Members' section is highlighted with a red box, showing a 'Manage Members' dropdown menu. The 'Activity History' section is also visible, showing a 'Log a Call' dropdown menu.

USER GUIDE FOR OPEN SMS PRO



c) From the dropdown, select 'Add Members – Search' to select the members to whom the message will be sent.



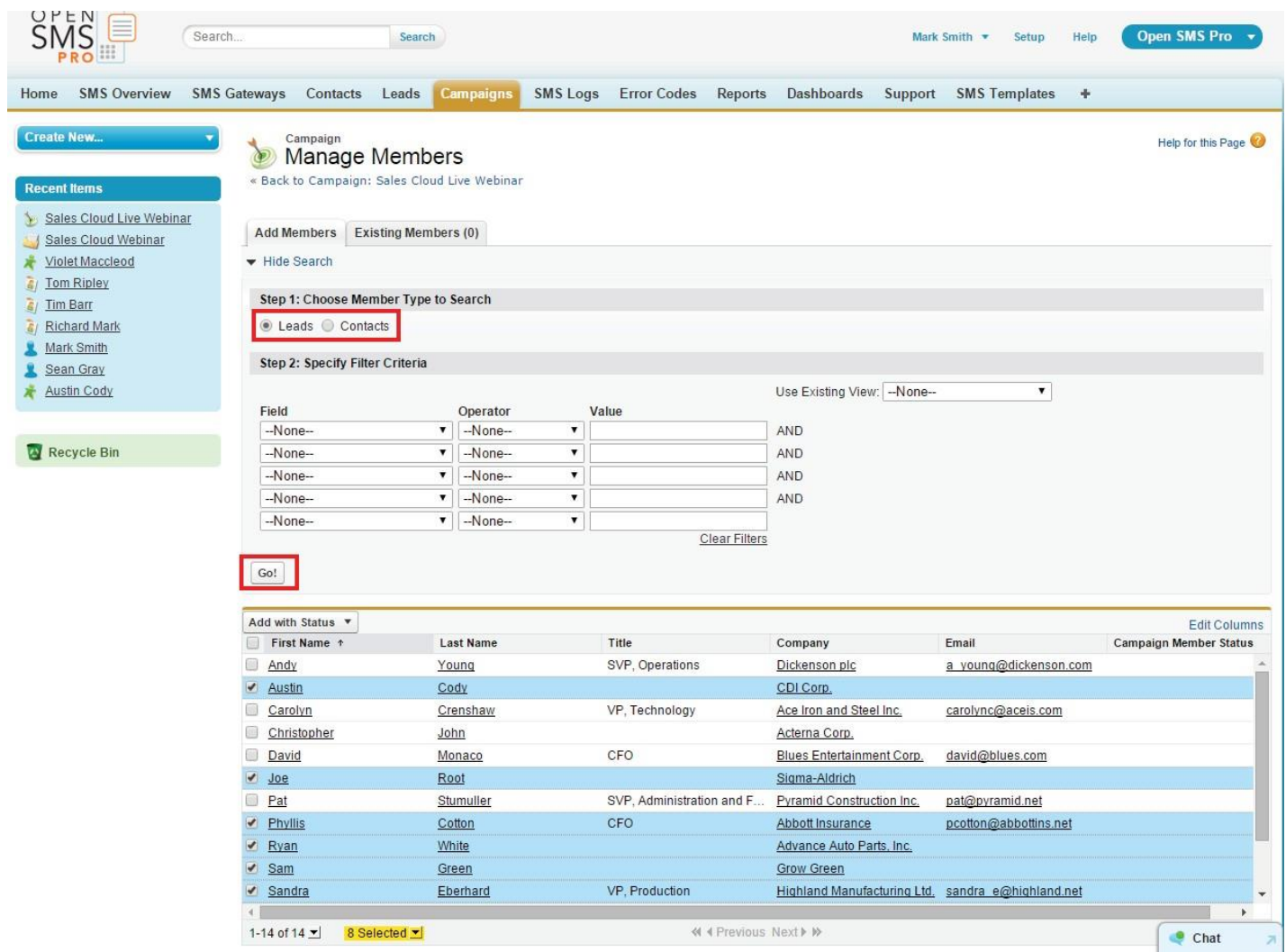
The screenshot displays the Open SMS Pro web application interface. At the top, there is a navigation bar with a search field, user profile (Mark Smith), and links for Setup, Help, and Open SMS Pro. Below this is a main menu with options like Home, SMS Overview, SMS Gateways, Contacts, Leads, Campaigns (highlighted), SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates.

The main content area shows the 'Sales Cloud Live Webinar' campaign details. On the left, there is a 'Recent Items' sidebar with a list of recent campaigns and a 'Recycle Bin' button. The campaign details include fields for Campaign Owner (Mark Smith), Campaign Name (Sales Cloud Live Webinar), Type (Webinar), Status (Planned), Start Date (9/22/2015), End Date (9/22/2015), Expected Revenue, Budgeted Cost, Actual Cost, Expected Response (%), Num Sent, Parent Campaign, Created By, and Last Modified By. A table on the right shows various statistics like Total Leads, Converted Leads, Total Contacts, Total Responses, Num Total Opportunities, Num Won Opportunities, Total Value Opportunities, and Total Value Won Opportunities.

Below the campaign details, there is a 'Custom Links' section with a link to 'View Campaign Influence Report'. At the bottom, the 'Campaign Members' section is visible, showing a dropdown menu for 'Manage Members' with options: 'Add Members - Search' (highlighted), 'Add Members - Import File', 'Edit Members - Search', and 'Update & Add Members - Import File'. There is also a 'Send SMS' button and a 'Campaign Members Help' link.

USER GUIDE FOR OPEN SMS PRO

d) Choose Leads or Contacts and click on the 'Go!' button to get a list of the members. Check the boxes for the members you want to add.



Manage Members

« Back to Campaign: Sales Cloud Live Webinar

Add Members Existing Members (0)

▼ Hide Search

Step 1: Choose Member Type to Search

☒ Leads ☐ Contacts

Step 2: Specify Filter Criteria

Use Existing View: --None--

Field	Operator	Value	
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

[Clear Filters](#)

Go!

Add with Status ▼

First Name ↑	Last Name	Title	Company	Email	Campaign Member Status
☐ Andy	Young	SVP, Operations	Dickenson plc	a_young@dickenson.com	
☒ Austin	Cody		CDI Corp.		
☐ Carolyn	Crenshaw	VP, Technology	Ace Iron and Steel Inc.	carolync@aceis.com	
☐ Christopher	John		Acterna Corp.		
☐ David	Monaco	CFO	Blues Entertainment Corp.	david@blues.com	
☒ Joe	Root		Sigma-Aldrich		
☐ Pat	Stumuller	SVP, Administration and F...	Pyramid Construction Inc.	pat@pyramid.net	
☒ Phyllis	Cotton	CFO	Abbott Insurance	pcotton@abbottins.net	
☒ Ryan	White		Advance Auto Parts, Inc.		
☒ Sam	Green		Grow Green		
☒ Sandra	Eberhard	VP, Production	Highland Manufacturing Ltd.	sandra_e@highland.net	

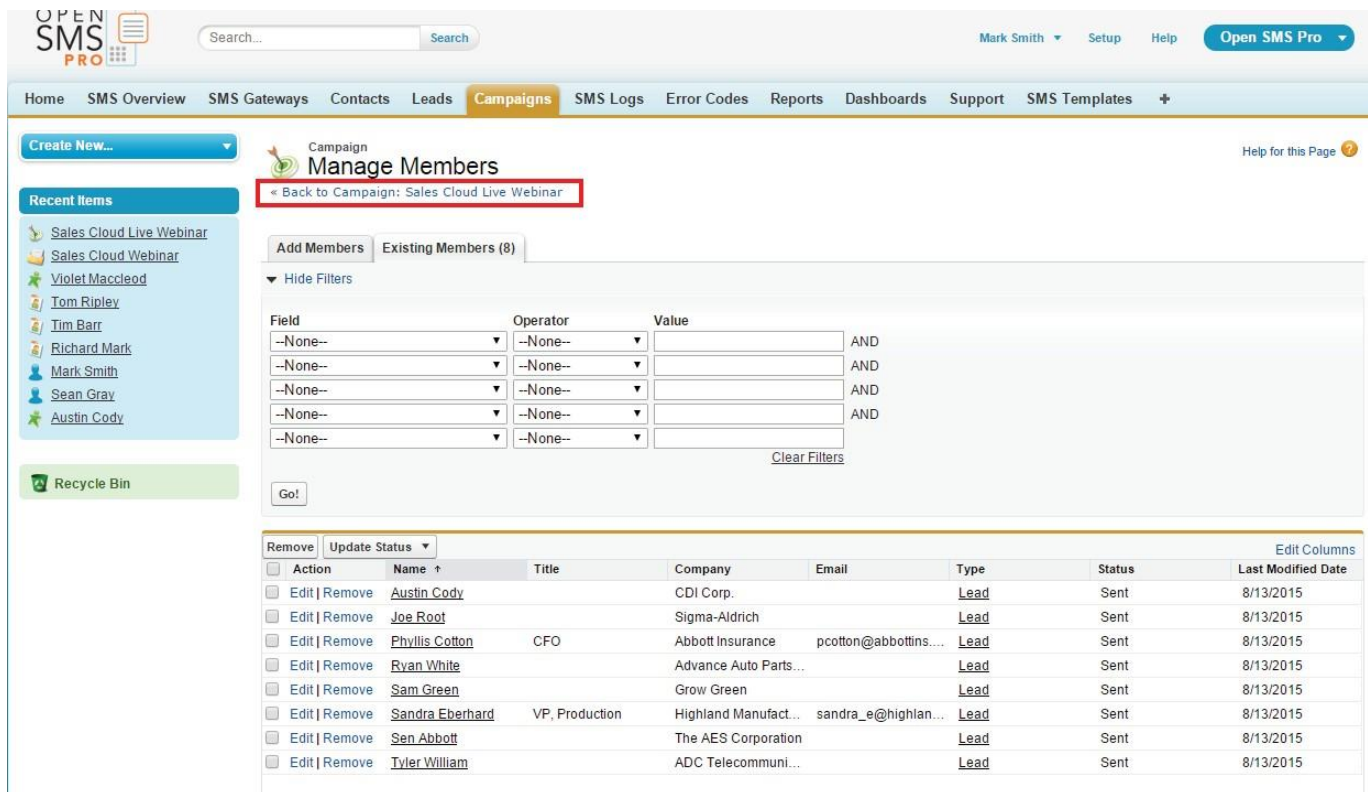
1-14 of 14 ▼ 8 Selected ▼

« Previous Next »

Chat

USER GUIDE FOR OPEN SMS PRO

e) Go back to the 'Campaign Event' page by clicking on the section highlighted in the screenshot below



Manage Members

◀ Back to Campaign: Sales Cloud Live Webinar

Add Members Existing Members (8)

Hide Filters

Field	Operator	Value	
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

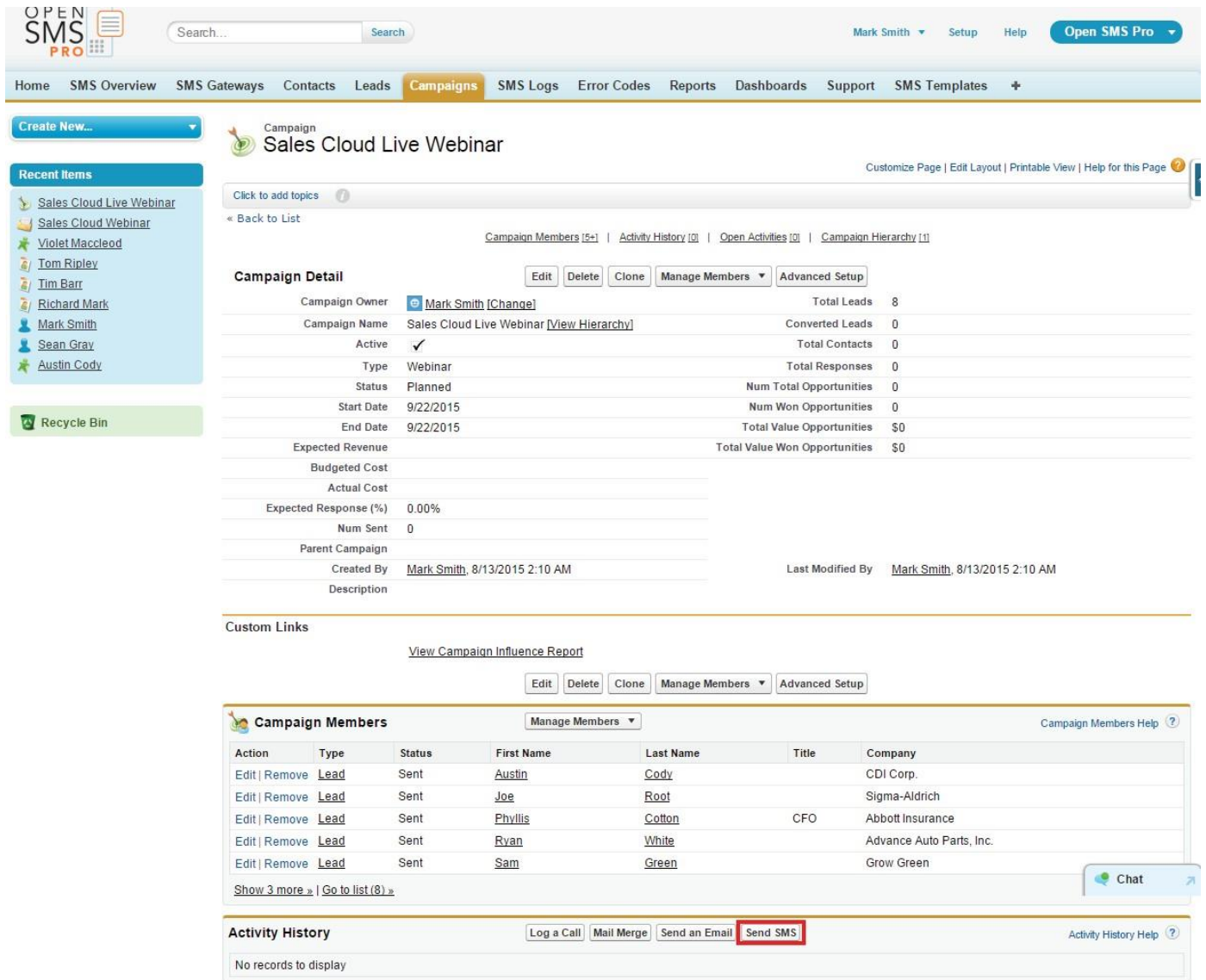
Clear Filters

Go!

Remove	Update Status	Name	Title	Company	Email	Type	Status	Last Modified Date
☐ Edit Remove		Austin Cody		CDI Corp.		Lead	Sent	8/13/2015
☐ Edit Remove		Joe Root		Sigma-Aldrich		Lead	Sent	8/13/2015
☐ Edit Remove		Phyllis Cotton	CFO	Abbott Insurance	pccotton@abbottins....	Lead	Sent	8/13/2015
☐ Edit Remove		Ryan White		Advance Auto Parts...		Lead	Sent	8/13/2015
☐ Edit Remove		Sam Green		Grow Green		Lead	Sent	8/13/2015
☐ Edit Remove		Sandra Eberhard	VP, Production	Highland Manufact...	sandra_e@highlan...	Lead	Sent	8/13/2015
☐ Edit Remove		Sen Abbott		The AES Corporation		Lead	Sent	8/13/2015
☐ Edit Remove		Tyler William		ADC Telecommuni...		Lead	Sent	8/13/2015

USER GUIDE FOR OPEN SMS PRO

f) In the 'Activity History' section, click on the 'Send SMS' button.



The screenshot displays the Open SMS Pro web application interface. The top navigation bar includes a search bar, user profile (Mark Smith), and links for Setup, Help, and Open SMS Pro. The main navigation menu lists various sections: Home, SMS Overview, SMS Gateways, Contacts, Leads, Campaigns (highlighted), SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates.

The 'Campaigns' section is active, showing the 'Sales Cloud Live Webinar' campaign. The left sidebar contains a 'Recent Items' list with links to various campaigns and users, and a 'Recycle Bin' button. The main content area shows the 'Campaign Detail' for 'Sales Cloud Live Webinar', including fields for Campaign Owner, Name, Type, Status, Start/End Dates, Expected Revenue, Budgeted Cost, Actual Cost, Expected Response (%), Num Sent, Parent Campaign, Created By, and Last Modified By. A 'Custom Links' section provides a link to 'View Campaign Influence Report'.

Below the campaign details, the 'Campaign Members' section is visible, showing a table of members with columns for Action, Type, Status, First Name, Last Name, Title, and Company. The 'Activity History' section at the bottom shows a list of activities with buttons for Log a Call, Mail Merge, Send an Email, and Send SMS (highlighted with a red box). The 'Activity History' section currently displays 'No records to display'.

USER GUIDE FOR OPEN SMS PRO



g) From this 'Campaign' page that opens, the user can send a bulk message to all the selected 'Campaign Members' notifying them about the 'Campaign Event.'



Mark Smith ▾
Setup
Help
Open SMS Pro ▾

Home
SMS Overview
SMS Gateways
Contacts
Leads
Campaigns
SMS Logs
Error Codes
Reports
Dashboards
Support
SMS Templates
+

Send SMS Campaign

Send SMS to your Campaign Members/Other Contacts

Compose New SMS for Selected sObject

Available Credits: 5874

Sends a message using the gateway
* Required Information

Name
Sales Cloud Live Webinar

Template
-Select- ▾

Message

Character count: 0 Characters

Screened Number or Unreachable Numbers

Users on this list cannot receive an SMS

Name	Mobile	Object Name	Reason
Phyllis Cotton		Lead	No Mobile Number
Sandra Eberhard		Lead	No Mobile Number

USER GUIDE FOR OPEN SMS PRO



h) From the 'Template' dropdown, select the 'Campaign Event' template (created earlier).



Mark Smith ▾ Setup Help

[Home](#)
[SMS Overview](#)
[SMS Gateways](#)
[Contacts](#)
[Leads](#)
[Campaigns](#)
[SMS Logs](#)
[Error Codes](#)
[Reports](#)
[Dashboards](#)
[Support](#)
[SMS Templates](#)
[+](#)


Send SMS Campaign

Send SMS to your Campaign Members/Other Contacts

Compose New SMS for Selected sObject

Available Credits: 5874

Sends a message using the gateway
! Required Information

Name: Sales Cloud Live Webinar

Template: -Select-

Message: -Select-

Sales Cloud Webinar

Character count: 0 Characters

Screened Number or Unreachable Numbers

Users on this list cannot receive an SMS

Name	Mobile	Object Name	Reason
Phyllis Cotton		Lead	No Mobile Number
Sandra Eberhard		Lead	No Mobile Number

USER GUIDE FOR OPEN SMS PRO



i) The message body will be automatically populated once the template is selected. Click on the 'Send' button to send the message to all 'Campaign members.'



Mark Smith ▾
Setup
Help
Open SMS Pro ▾

Home
SMS Overview
SMS Gateways
Contacts
Leads
Campaigns
SMS Logs
Error Codes
Reports
Dashboards
Support
SMS Templates
+

Send SMS
Campaign

Send SMS to your Campaign Members/Other Contacts

Compose New SMS for Selected sObject

Available Credits: 5874

Sends a message using the gateway ! = Required Information

Name
Template
Message

Sales Cloud Live Webinar
Sales Cloud Webinar ▾

Hi (CampaignMember.Lead.Name),
Join us on September 22, 2015 at 3 p.m. PST for Sales Cloud Live Webinar to learn more about the keys to measuring sales success.

Character count: 163 Characters

Screened Number or Unreachable Numbers

Users on this list cannot receive an SMS

Name	Mobile	Object Name	Reason
Phyllis Cotton		Lead	No Mobile Number
Sandra Eberhard		Lead	No Mobile Number

USER GUIDE FOR OPEN SMS PRO



j) If the message is delivered, the user gets a notification 'SMS successfully sent to the SMS Gateway'.

It will also notify the user if there are any failures. The user can see the failures on the 'Screened Number or Unreachable Numbers' list below.



Mark Smith ▾
Setup
Help
Open SMS Pro ▾

Home
SMS Overview
SMS Gateways
Contacts
Leads
Campaigns
SMS Logs
Error Codes
Reports
Dashboards
Support
SMS Templates
+


Send SMS

Campaign

Send SMS to your Campaign Members/Other Contacts

Compose New SMS for Selected sObject


SMS successfully send to the SMS Gateway and found few failures.

Available Credits: 980

Sends a message using the gateway
! = Required Information

Name
Sales Cloud Live Webinar

Template
Sales Cloud Live Webinar ▾

Message

Hi {!CampaignMember.Lead.FirstName},
Join us on September 22, 2015 at 3 p.m. PST for Sales Cloud Live Webinar to learn more about the keys to measuring sales success.

Character count: 167 Characters

Screened Number or Unreachable Numbers

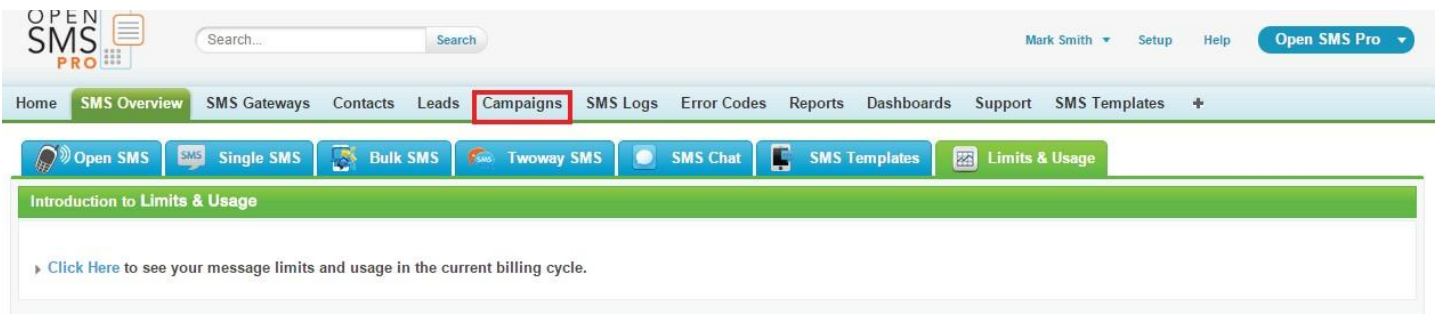
Users on this list cannot receive an SMS

Name	Mobile	Object Name	Reason
Phyllis Cotton		Lead	No Mobile Number
Sandra Eberhard		Lead	No Mobile Number
Ryan White	(540) 578-8287	Lead	Sending Failed
Sen Abbott	(590) 547-4745	Lead	Sending Failed

Message Limits and Usage

a) After subscribing to a package and successfully installing the 'Open SMS Pro' application, the user will gain access to all the relevant tabs.

First click on the 'SMS Overview' tab and then on the 'Limits and Usage' page click on the highlighted words 'Click Here' to check the available message credits, the number of messages that can be sent and the usage in the current billing cycle.



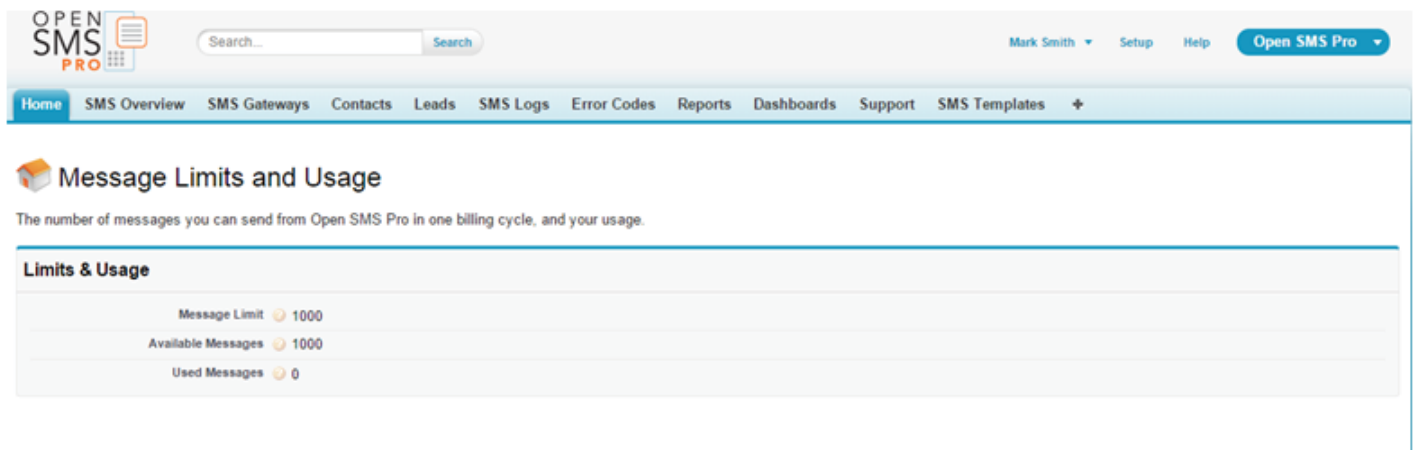
USER GUIDE FOR OPEN SMS PRO



b) The 'Message Limit' shows the maximum number of messages that can be sent with the current subscription, in other words, it shows the maximum message credits. One credit is equal to one message. Example, if the user subscribes to a 1000 message package, then the message limit will be exactly 1000.

'Available Messages' are the amount or number of messages left in the account after sending/receiving SMS. Example, if the user sends 100 messages out of a balance of 1000 messages, the available messages will be 900

'Used Messages' show the number of messages used by the user. Example, the user has sent 100 messages, so the used message is 100.



The screenshot shows the Open SMS Pro dashboard. At the top, there is a navigation bar with the Open SMS Pro logo, a search bar, and user information (Mark Smith, Setup, Help, and a dropdown for Open SMS Pro). Below the navigation bar is a menu with links: Home, SMS Overview, SMS Gateways, Contacts, Leads, SMS Logs, Error Codes, Reports, Dashboards, Support, and SMS Templates. The main content area is titled 'Message Limits and Usage' and includes a sub-header: 'The number of messages you can send from Open SMS Pro in one billing cycle, and your usage.' Below this is a table with the following data:

Limits & Usage	
Message Limit	1000
Available Messages	1000
Used Messages	0