

CM.com

New User Guide v1.5




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Introduction

Thank you for using CM's messaging solutions. After reading this article, you will be able to put best practices into your campaigns to ensure your KPIs are met.

First, we'll teach you how to upload your contacts onto our platform via the **Address book app**  for sending SMS.

Second, you're shown how to send SMS: **Send**  **& SMS Campaigns** .

Third, **Email Campaigns**  is explained.

If these 4 apps are not in your overview this could be one of the 2 following reasons:



1. You are an online only customer. Our advanced solutions SMS Campaigns and Email Campaigns are only available for Essentials +.
 - If you want to get an Essentials + subscription, please check our [pricing page](#).
 - Email Campaigns is free until July 1st 2017. Please contact ben.sestig@cmtelecom.com to get hooked onto the platform.
2. You haven't downloaded the app into your CM platform.
 - If you want the apps in your platform, visit the [App Store](#).

At the time of writing it is recommended to use the following apps.

For contact uploads:

1. Addressbook app  (<http://addressbook.cmtelecom.com>)

For sending texts:

1. SMS Campaigns 
2. Send app 

For Email:

1. Email Campaigns 

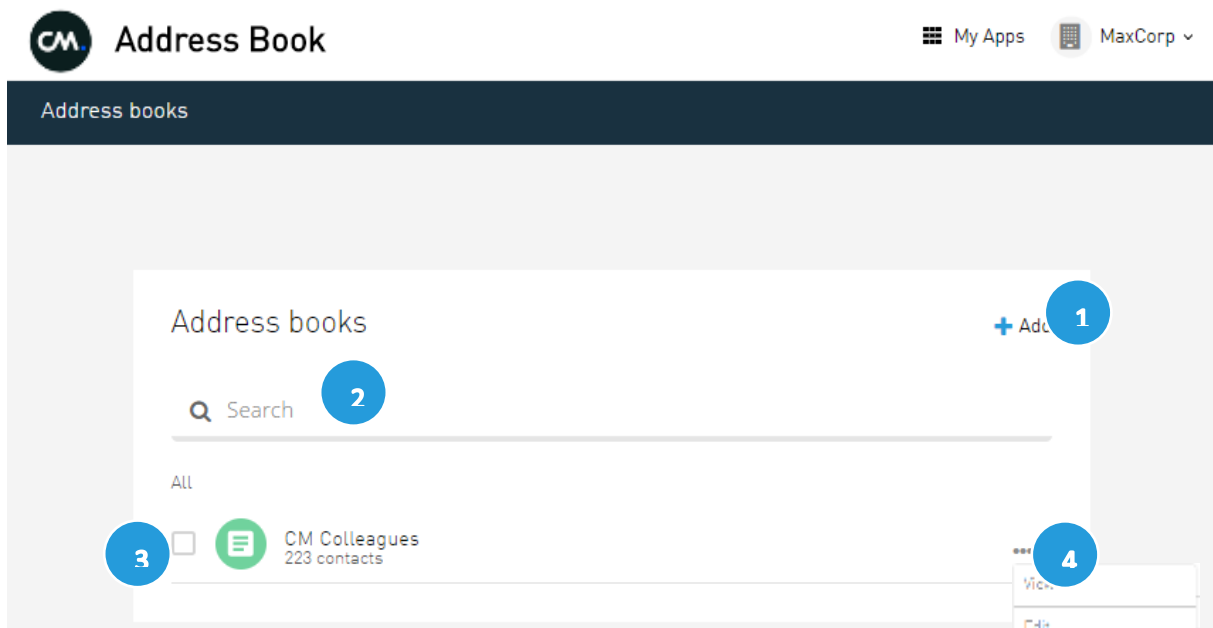
Address book app

USPs

- <https://addressbook.cmtelecom.com>
- 1 million contacts per upload
- Insanely fast
- Single app to control the contacts of all your apps

Overview page

To set up a proper Address list, make sure you have an excel file ready with all the data.



1. To upload a group, press **+ Add**
2. Search bar, type in any Address book name and the results will show only those that qualify.
3. Click on the Name to see the individual fields and go to the [Address List Overview](#)
4. Click on [...] to:
 - a. edit (List- and column names are changeable)
 - b. remove the list
 - c. or Favorite the list (This way it is shown at the top of the Address book overview)

Upload

1. To upload a group, press **+** Add
2. You are now requested to (1) select a file and (2) optionally name the document. Click continue after you've selected a document.

The screenshot shows the 'Address Book' interface with a file 'CM Colleagues.xlsx' (225 contacts - 5 columns) being processed. The interface displays four columns with different selection options:

Column 1	Column 2	Column 3	Column 4
First name	Column matched E-mail address	Can't match column Number	Can't match c City
Last		Number	City
Phil	Phil.Stubbs@cmtelecom.com	4478500	London
Magdalena	Magdalena.Stelbach@cmteleco...	4478172	London
Babs	Babs.Wasi@cmtelecom.com	4474801	London
Pierre-Yves	Pierre-Yves.Gibut@cmtelecom.c...	4473988	London
Kevin	Kevin.Kaci@cmtelecom.com	4479993	London
Skip Save	Skip Edit	Skip Edit	Skip

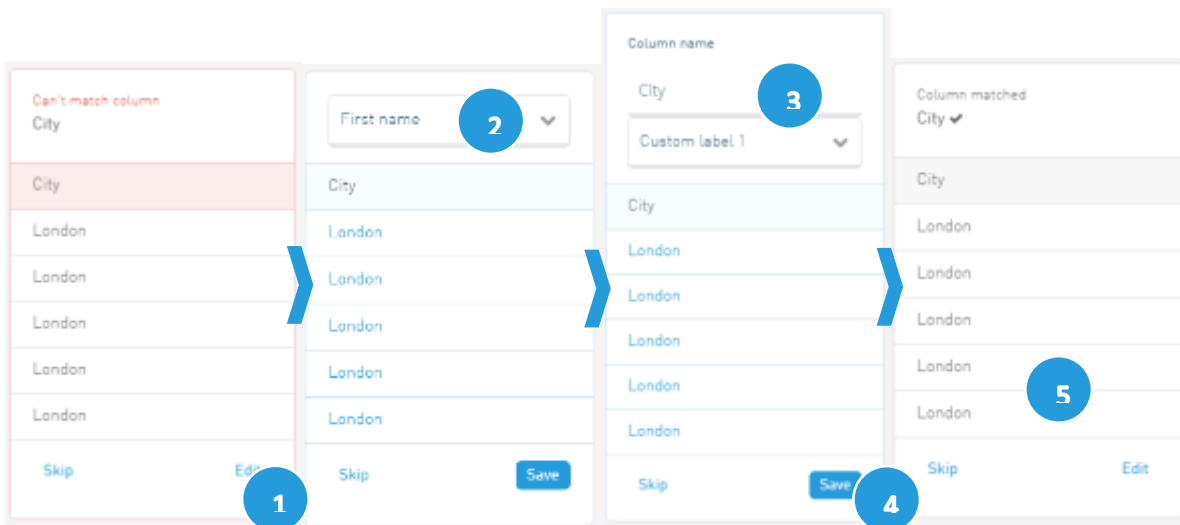
Buttons: Cancel, Continue

You can have 4 types of selection options and you can always **Skip** if you don't want to add the column.

1. The system predicts the value of the column. Skip, Save or Edit by clicking on the dropdown.
2. The system predicts and is fairly certain about the value. Skip if you don't want to add the column, or click Edit to change the column type/name.
3. The system has no idea what the value is, but it is a *standard value*. Skip if you don't want to add the column, or click Edit to change the column type/name.
4. The system has no idea what the value is, but it is a *custom field*. Skip if you don't want to add the column, or click Edit to change the column type/name.

Check the next page for more details.

How to change the name and value of a column:

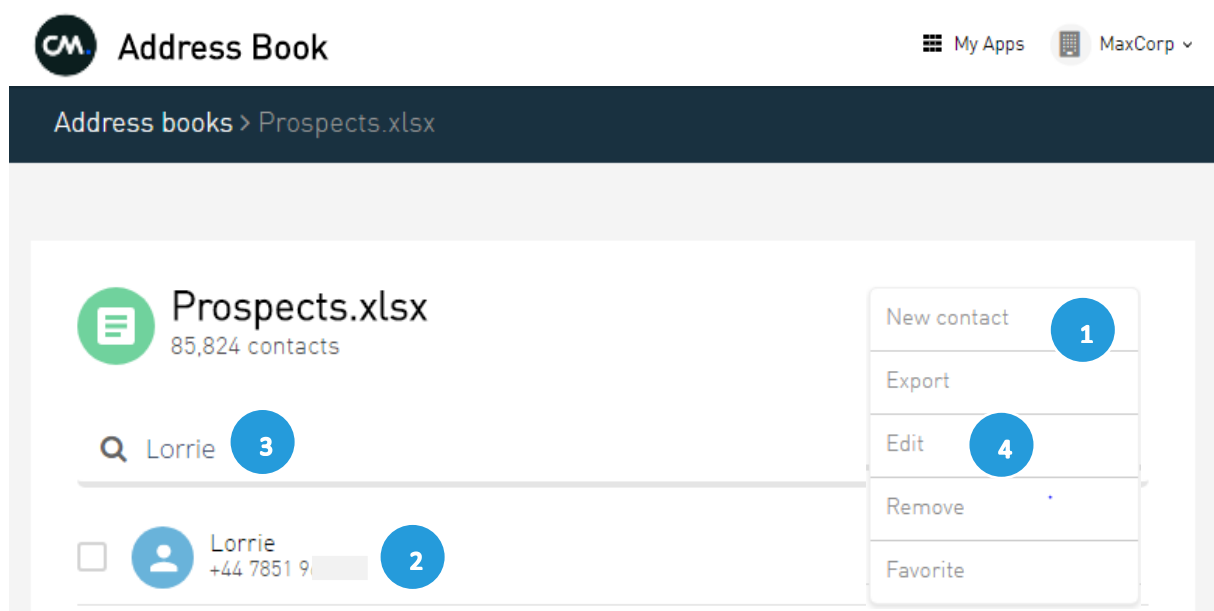


1. Click “edit”
2. Click on the dropdown menu (“First name” in this example)
 - a. For phone numbers you are asked to select a country for when we are missing an international phone format. Please ensure the country codes are set-up properly if you are sending to multiple destinations.
3. Select Custom Label # and change the name in the top fill-out box
4. Click on “Save”
5. Smile 😊

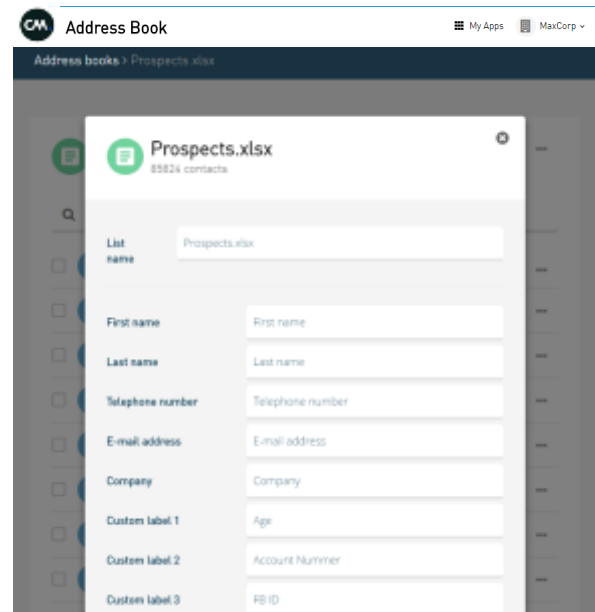
When you’ve saved or skipped all columns, press [Continue](#)

Edit and view Address list

After selecting an address list, the address list overview appears.

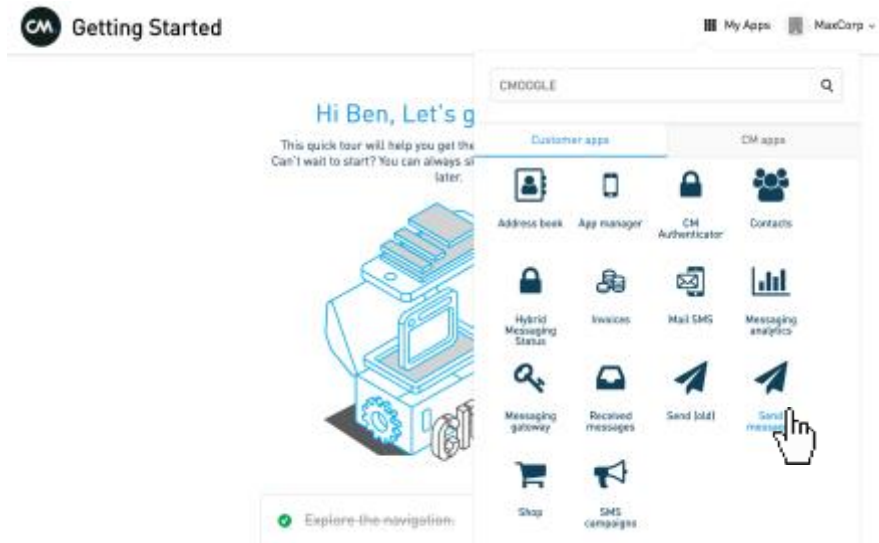


1. Address list options [...]
 - a. New contact: Manually add a contact to the address list
 - b. Export: This feature will allow you to export the data back to an excel file. Not available during the time of writing this document.
 - c. Edit: See 4
 - d. Remove: Guess
 - e. Favorite: This will put this address list on top of the list in the main Address book overview
2. Click here to see the details of a single contact
3. Search bar, qualified contacts will appear in a drop-down list.
4. Edit: Here you can change the address list name and column names. →

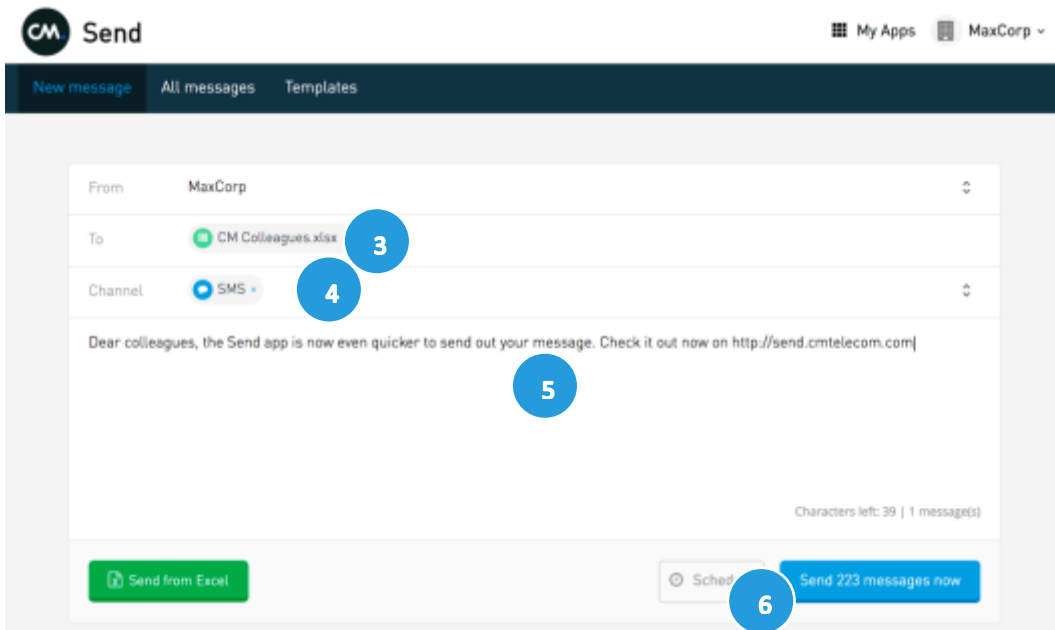


Send app

1. Go to the **Send** in the platform header.



2. Click on the “Send messages” input field when in the **send app**. From that point it is similar to the **send-beta** app (send-beta.cmtelecom.com).



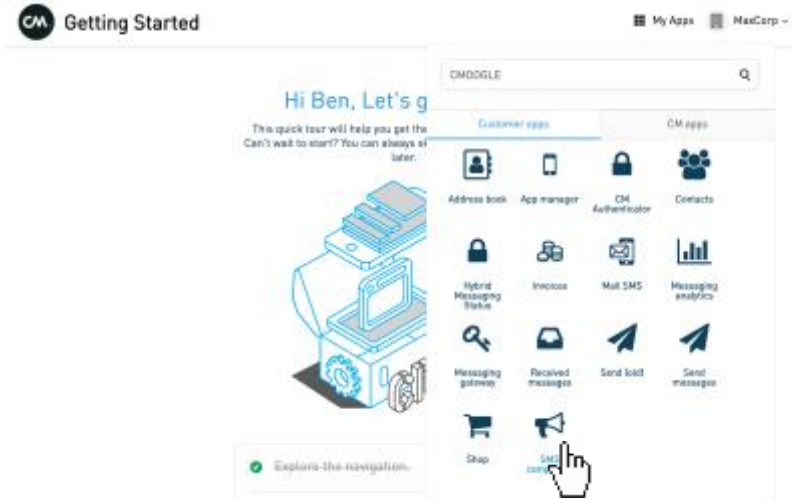
Fill out the “From” ID. This is the ID that the recipient gets to see as the sender.



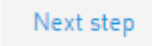
3. Select a group (check how to upload a group [here](#)) and/or add phone numbers manually (be sure to add the international country code (+44 or 0044)).
4. Select a channel (you can upload your app details to send texts via push if possible, contact me if you want this). Otherwise just select SMS
5. Opt-out. For more insights on the opt-out functionality for the countries you’re sending to, please visit our help center > messaging > [Country Specifics](#).
6. Click Send ### messages now to.... Send now. or schedule if you want to schedule.
7. If you want to send from an excel file that is still located on your computer. Choose Send from Excel.

SMS Campaigns

In contrast to the other apps, setting up a campaign via SMS Campaigns provides the user with more options. Every month features will be added to this app.

1. Go to the SMS Campaigns app.



2. You can check out basic statistics of sent campaigns here. For more detailed statistics, check out the "Stats" icon. For a **new campaign** click the **+sign**. 
3. Select a group (check how to upload a group [here](#)) and add a campaign name.
4. After selecting a group, click **next step**. You now get to the **design page**  
5. Fill-out the **Sender ID**, message content and/or add a link.
 - a. If you want to track the amount of clicks on a link, we need to add a tracker. We do this by giving all the recipients a different link, which is shortened. Fill out the link in the box in the bottom left and hit the "Link" button.

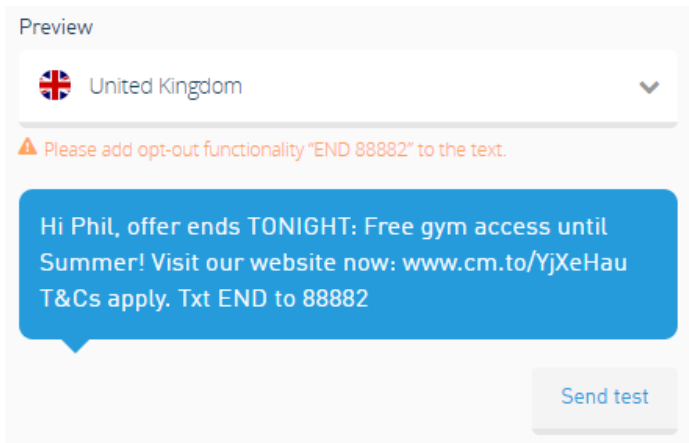
Sender*

Big Gym

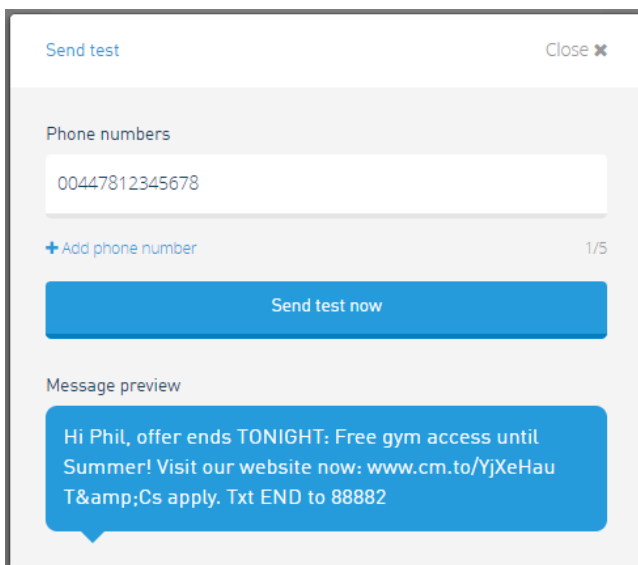
Message*

Hi {{firstname}}, offer ends TONIGHT: Free gym access until Summer! Visit our website now! T&Cs apply. Txt END to 88882. {{link}}

6. Opt-out. For more insights on the opt-out functionality for the countries you're sending to, please visit our help center > messaging > [Country Specifics](#).



- When you're done and you want to check whether the message comes across properly you can **send a test** to your own phone before proceeding to the confirmation page.



- If you like the look, click "Finalize" to go to **the confirmation page/scheduling page**.

Final step

- On page 3. You can select to schedule or send now. After clicking **schedule**, you can always go back to edit the campaign after scheduling.

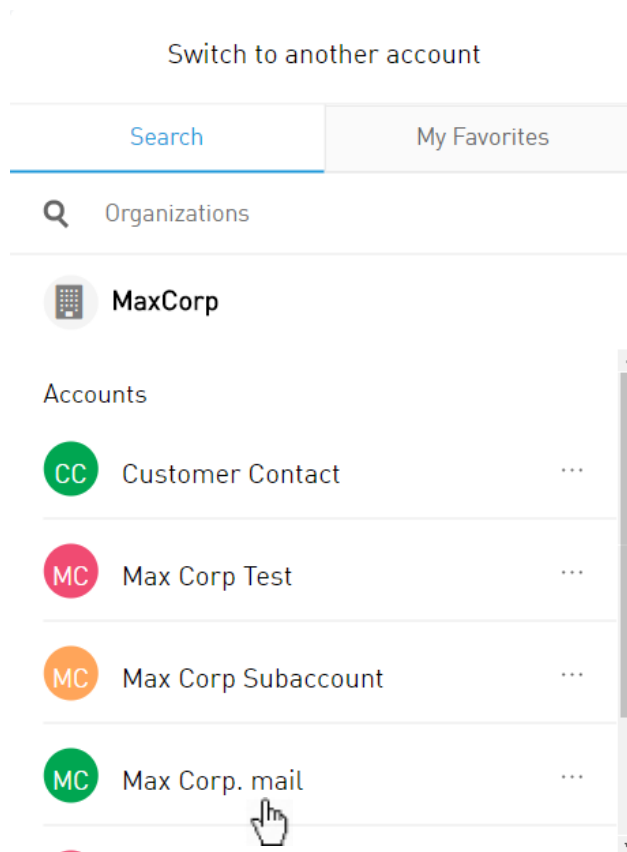
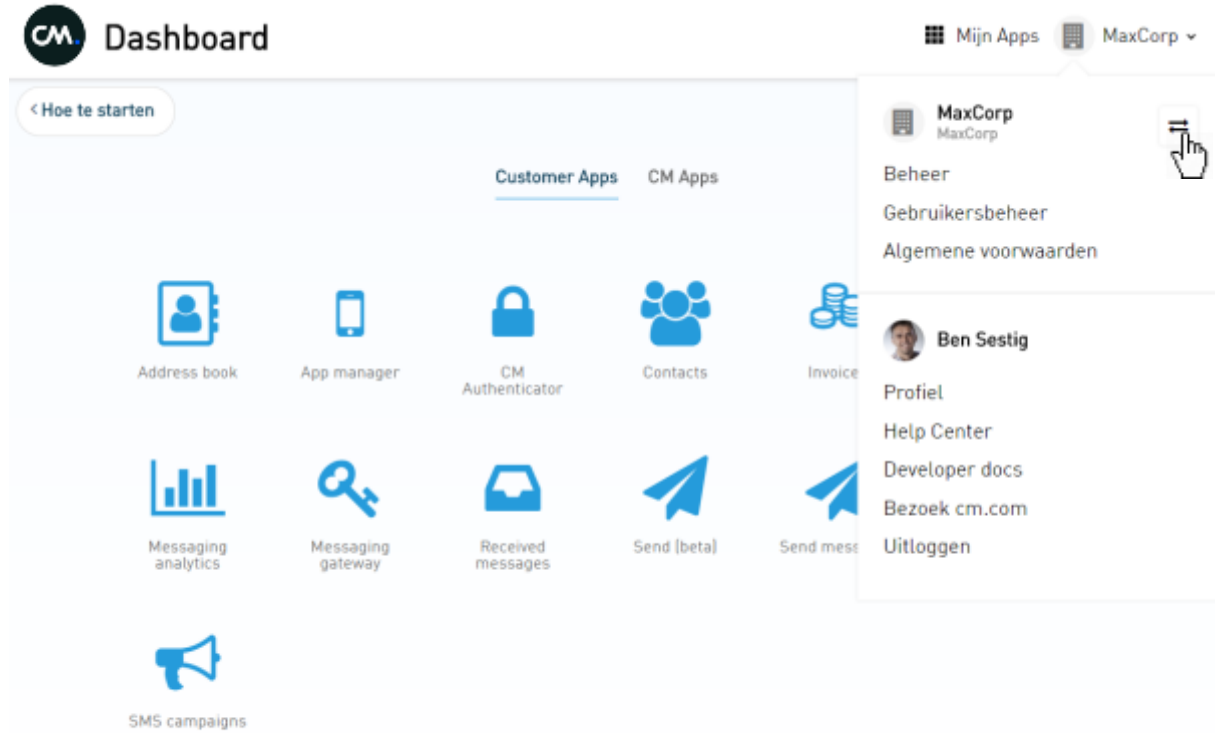
Sent campaigns are irreversible! So be sure the campaign is set-up properly

- Once you've sent your campaign, you can check-out the process in the campaign overview page. Like **delivery rates** and **click-through rates**.

Email Campaigns

Email Campaigns is CM's email marketing tool for companies to send out all sort of email campaigns (newsletters, promotion emails, CRM related, etc.). This online App offers a lot of options in terms of personalization and insights of your sending.

- A. GO TO THE EMAIL CAMPAIGNS APP (Change account and select your Email Account)



B. NAVIGATE IN THE APP



The Email Campaigns' app is structured as followed:

4 tabs you can navigate in:

- **Campaigns:** creation of a new campaign, overview of your campaigns (sent, drafts, saved), and the possibility to access the analytics or edit each of you campaign. Note that the number of recipients is indicated for each campaign.
- **Contact lists:** manage your contacts lists (add, delete and see the unsubscribed).
- **Templates:** create or manage your templates.
- **Settings:** management of the sender address.



C. CAMPAIGNS:



A. Campaigns Overview

On this page you have an overview of all your campaigns. Here are the specific status and possible interactions for each type of campaigns:

- Your past or sent email campaigns are marked by a green “check” icon ✓ .

Interaction options:



- Clone the campaign
- View the stats
- Preview the campaign
- Download as HTML
- Save as a template

- Your drafts and saved campaigns are symbolized by a blue pen icon ✎

Interaction options:



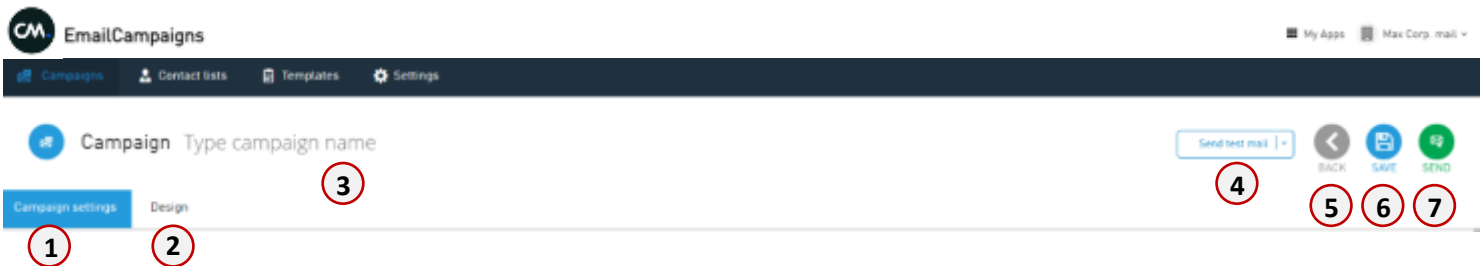
- Edit Campaign
- Delete campaign
- Clone campaign
- Preview campaign
- Download HTML
- Save as a template

B. Create a new campaign

Create a new campaign by clicking the Add button :



New campaign menu:



1: Campaigns settings = set-up your campaign (subject, sender name, contact list to send to, scheduling, use of a template, etc.)

Important - How to add a merge tag as a subject line:

You need to select an address list.

Subject
{{ Recipient.Number }}

As merge tags are linked to the address list, the more information you have in your address list, the more merge tags you can have.

For example: in addition to your customer email address, you also have his or hers NAME and FIRSTNAME. Then you can create a subject line that will personalize each email with the NAME and FIRSTNAME.

Subject
{{ Recipient.Name }}

2: Design = design your mailer (drag & drop content, define a structure, add buttons, html, etc.). Your creativity is the limit!

3: Type campaign name = name your campaign i.e. “Monthly Newsletter”. This name will only be shown in the App.

4: Send test mail = you can either send a test email to selected recipients, or preview the campaign (to see what it looks like in a mailbox or a browser).

5: Back = go back to the previous page (campaign overview)

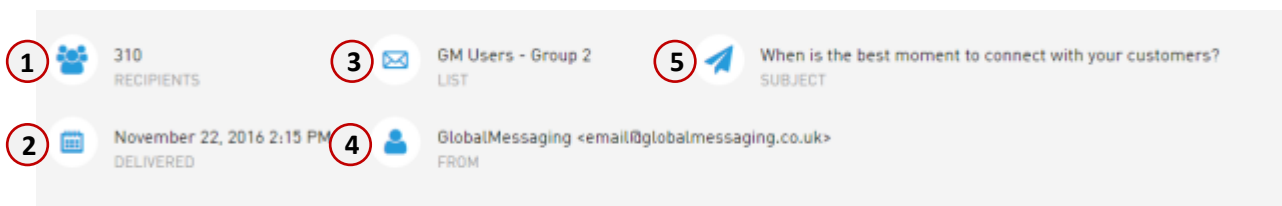
6: Save = save your campaign as a draft you can edit or send anytime.

7: Send = send your email campaign to your recipients.

C. Campaign analytics

Analytics are divided into 4 main parts:

- Campaign overview



1: Recipients = amount of recipients the campaign has been sent to.

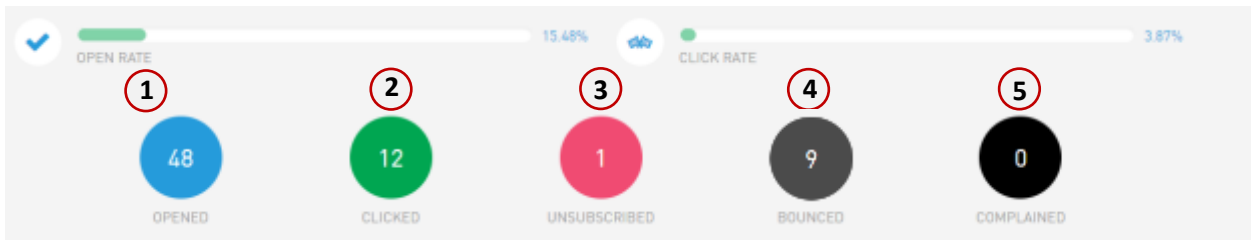
2: Delivered = date and time the campaign has been delivered

3: List = name of the contact list the campaign has been sent to.

4: From = sender address used to send out the campaign. This can be set-up in the “Settings” tab.

5: Subject = this is the object of the email your audience will receive.

- Results



1: Open rate = Number of opened emails / number of delivered emails (here $48/310 = 15.48\%$). We indicate both the percentage and the value (blue circle).

2: Click rate = Number of clicks / number of delivered emails (here $12/310 = 3.87\%$). We indicate both the percentage and the value (green circle).

3: Unsubscribed = amount of people that unsubscribed from the mailing list (contact list). Therefore you won't be able to send them emails.

4: Bounced = Number of both unregistered and non-existing email addresses. Typos and emails sent to unsubscribed email addresses are causes of "bounced" emails.

5: Complained = When your email is reported as Spam by the recipient.

- Links clicked

Link	Clicks
https://www.globalmessaging.co.uk/accounts/login/	12

Here you have an overview of the links included in your mailer. You can see the number of clicks each link generated. Here the link generated 12 clicks.

- Recipients

Email address	Delivered	Opened	Clicked	Status
accounts.payable@██████████				● BLACKLISTED
██████████	● APR 04, 2017 20:26	● APR 04, 2017 20:26	● APR 05, 2017 09:21	
██████████	● APR 04, 2017 20:26	● APR 04, 2017 20:26		
██████████	● APR 04, 2017 20:26			● BOUNCED
██████████				● BLACKLISTED

[Show all 34 recipients >](#)

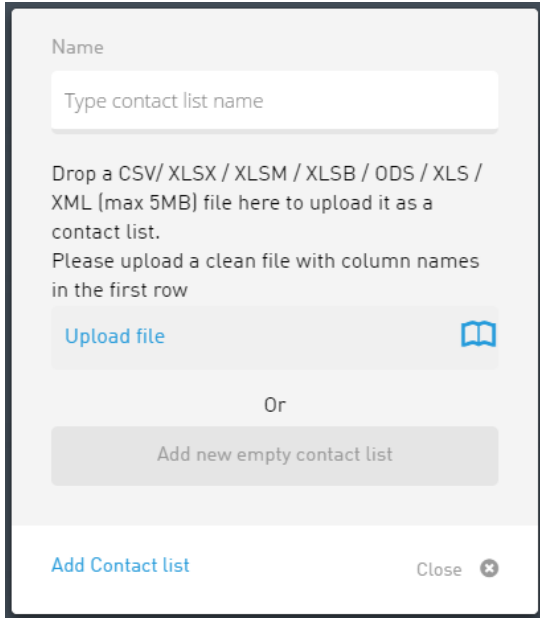
Detailed information about each recipient: when the email has been delivered; if opened, when; if it has been clicked and how many links; and the status (blacklisted, bounced).

D. CONTACT LIST:

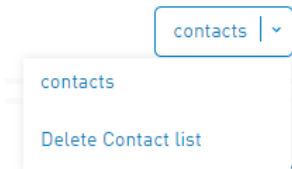


A. *Add a new contact list* by clicking the Add button:

A pop-up window appears and ask you to upload your file.



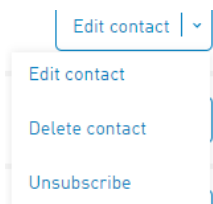
Once a new list of contacts created, you can manage the "contacts" or "delete the contact list".



If you click on contacts, you will have an overview of each contact's status, email address and date of upload:

Status	Email address	Confirmed	Search contact
BOUNCED	accounts.payable@	04/04/17 26:12	Edit contact -
ACTIVE	accountsing@	04/04/17 26:12	Edit contact -

Then each contact can be edited (if you want to change the email address for example), deleted or unsubscribed.



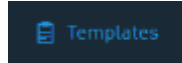
B. *Manage unsubscribed contacts*



See the details of contacts that unsubscribed from your mailing list: date and time, and the email address:

Status	Email address	Unsubscribed
● UNSUBSCRIBED	accvets0n[REDACTED]	06/02/17 12:39
● UNSUBSCRIBED	adri@var[REDACTED]	22/11/16 16:17

E. TEMPLATES:

A. *Templates Overview*

On this page you have an overview of all your templates. Here are possible interaction options you have for each template:

Edit template | v

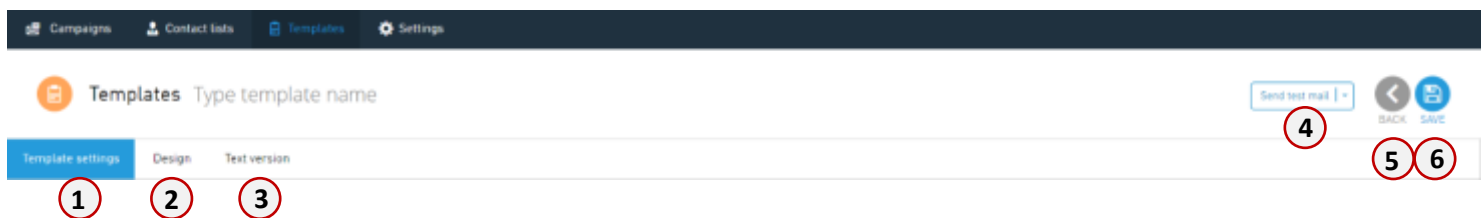
- Edit Template
- Delete Template
- Clone template
- Preview template
- Download HTML

B. *Add a new template*

Click on the add button



New template menu:



1: Campaigns settings = you are asked to enter a description for this template. This is to explain the purpose of the specific template i.e. “this is a sales follow-up email”. This description will help people understand what this template is made for when editing.

2: Design = design your template (drag & drop content, define a structure, add buttons, html, etc.). Your creativity is the limit!

3: Text version = sometimes images are not displayed in mailbox. Instead you’ll have lines of text as a back-up. This is where you can upload this back-up text. And Add a link to visualize your email in a browser.

4: Send test mail = you can either send a test email to selected recipients, or preview the template (to see what it looks like in a mailbox or a browser).

5: Back = go back to the previous page (template overview)

6: Save = save your template.

F. SETTINGS



Settings sender addresses

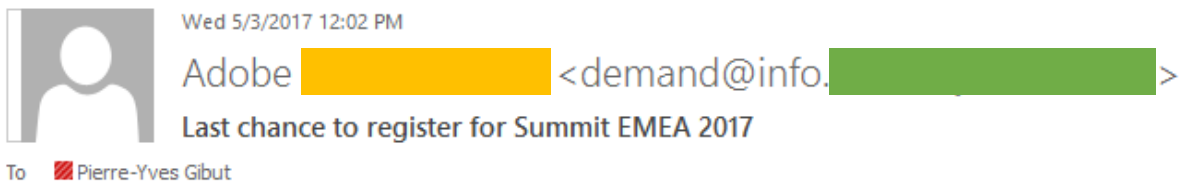


hello@globalmessaging.co.uk Created on November 17, 2016 2:16 PM November 16, 2016 2:16 PM	GM Modified on November 17, 2016 2:16 PM	Delete sender address -
email@globalmessaging.co.uk Created on November 16, 2016 2:16 PM November 16, 2016 2:16 PM	GM Modified on November 16, 2016 2:16 PM	Delete sender address -
accounts@globalmessaging.co.uk Created on November 16, 2016 2:15 PM November 16, 2016 2:09 PM	GM Modified on November 16, 2016 2:15 PM	Delete sender address -

In settings, you can add or delete a **new sender email address and sender name**.

The form titled "New sender email" contains two input fields: "Type the sender email address" and "Type the sender name". Below these fields is a blue button labeled "Add new sender". At the bottom of the form, there are two links: "Add new sender" and "Close" with a small icon.

When you receive an email, the **sender email address and name** is what you see in the FROM tab.
Example:



Important: In order to create a noreply@domain.com (this is an email address your recipient cannot reply to): Set-up a NOREPLY sender address requires manual configuration from [MARLOU](#).