

How to Setup the Text Campaigns in TSS

- In the **Owner/Admin account**, goto **Phone Settings**—>**Text**
- Click the **green “+”** sign at the bottom-right of the screen to **add** a new campaign. (If you haven't created a campaign yet, you must first configure your Default Campaign Number—[this is the default number your clients will receive when you initiate text campaigns])
 - **Label** the Campaign
 - Select which **Campaign Type** you'd like to set up:
 - i. **Mass Text Blast**: Send a pre-fabricated message to any amount of clients inside your database
 1. **Import Contacts** using the 'download sample file' example as a template for the excel entry
 2. *Optional* **Add a image** to the message
 3. **Test** allows you to send 1 text to a specific number to see what the text will look like on the client side
 4. **Send** releases the text message to all of the imported contacts that have been imported
 5. **Save** keeps the campaign, its message and contact list intact for later use
 6. **Activate** makes the Text Campaign live
 - ii. **Appointment Text**: Configure TSS to send a message on a specific day and time of day.
 1. **Choose** one of the available images and send Happy Thanksgiving, Happy Birthday, Merry Christmas, Happy New Year's along with a custom message.
 2. **Import Contacts** using the 'download sample file' example as a template for the excel entry
 3. **Test** allows you to send 1 text to a specific number to see what the text will look like on the client side
 4. **Send** releases the text message to all of the imported contacts that have been imported
 5. **Save** keeps the campaign, its message and contact list intact for later use

6. **Activate** makes the Text Campaign live
- iii. **Referral Alert:** (This is only visible if 'Referral Alerts' is turned on in Advance Criteria under Account Settings) Automatically sends a message to **Referrers**, alerting them that their Referral check is available for pickup.
 1. **Test** allows you to send 1 text to a specific number to see what the text will look like on the client side
 2. **Save** keeps the campaign, its message and contact list intact for later use
 3. **Activate** makes the Text Campaign live
- iv. **Text Back:** Allows you to auto-generate a pre-fabricated message to clients who call one of your numbers and for some reason either don't get through, or hang up. (Snow Storms, Power Outages, Holiday, etc.) This is send only once, per user, per year to avoid bombardment
 1. **Construct** a message that will be sent to clients who are unable to get through to one of your numbers
 2. **Activate** the campaign to enable TSS to automatically send the message to a client