

# Getting Started Guide



**September 2021**

## The Basics: Understanding Your Account

**Welcome to Simplified Alerts PLUS+.** This easy-to use messaging platform makes it simple to send out text messages to keep your subscribers engaged and informed.

Did you know that text messages are opened in 90-seconds or less? That's far faster than an average email.

You may use Simplified Alerts PLUS+ for notifications about schedule changes, important messages, or alerts. Or you can use it for promotions to special offers, links and your products / services. Whether sending notifications, promotions, or both, know that you have the support and reliability of Simplified Alerts, which has been sending text alerts since 2008.

Please use this User Guide to reference the important features of the product. Remember, this product is always being improved, so please send your feedback to [support@simplifiedalerts.com](mailto:support@simplifiedalerts.com) and our support team will respond promptly. We appreciate your feedback about bugs, issues and ways we can improve the system.

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## Settings

Login and click on the Settings icon in the lower left of your page.

1. Your Online Sign-up page.
2. Message Balance and Account Text Number.
3. Your Client ID (important for imports); you can change login and password.
4. Set your time zone.
5. You can change your logo, use an image that's 300x100 pixels.
6. Activate Organization Message. We recommend you keep it but uncheck to remove that or change it in line 7.
7. Organization Message. The name of your Organization along with Reply STOP to Cancel. These appear in every message but can be edited.
8. When someone opts-in through a keyword, this is the auto-response.
9. Click update to save the new settings.

**Settings** 1

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Online Sign-up Page: <http://www.simplifiedalerts.com/plus/optin?id=1232>

---

2 Messages Sent: 900 Credit Balance: -400  
Text Number: (833) 832-6343

---


Client ID: 3 1232 Organization: TestingCo

Last Name: Tester First Name: Ted

Work Phone: Cell Phone: 312-846-7669

Account Email (login): sales@simplifiedalerts.com Password: .....

Time Zone: 4 Central

Client Logo:  Acme Corp 5 Upload

---

Activate Organization Message: 6

Organization Message (up to 40 Chars): 7 TestingCo: Reply STOP to Cancel

---

Keyword Auto Responder Message: 8 Thanks for signing-up for our text alerts.

---

9 Update

## Enrolling Subscribers

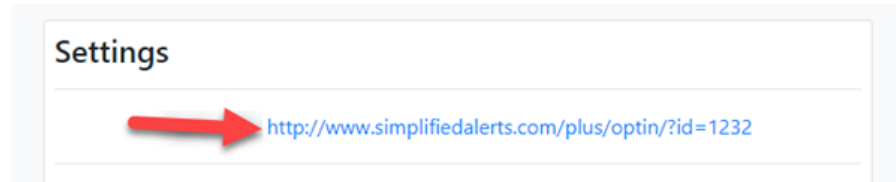
Simplified Alerts PLUS+ offers 3 ways to bring subscribers into your account; an Online Sign-up Page (OSP), Keywords and CSV File Imports. Subscribers are organized and assigned into Distribution Lists (which are matched by you to the OSP and Keywords).



## Online Sign-up Page

Your account comes with a unique Online Sign-up Page so users can enroll/opt-in. Just share the link and subscribers can enroll there. It will display your logo and Distribution Lists so users can select the alerts / messages they wish to receive.

You can find your Online Sign-up Page here: Settings > Opt-in URL. You can also change your logo from that page too (recommended size is 300x100 pixels).



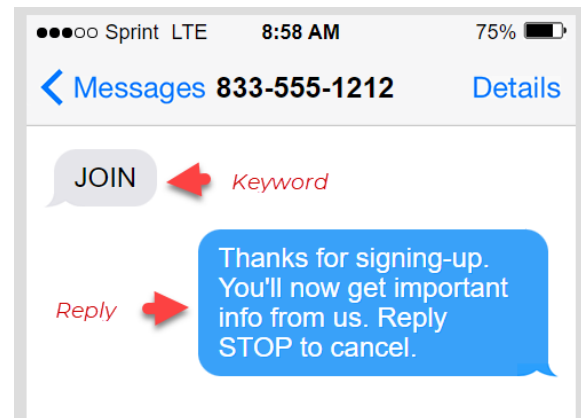
**Note:** You can hide private distribution lists from appearing on your OSP by unchecking the Signup Form checkbox on the Distribution List page.



## Keywords

Keywords are words you can create to enroll subscribers, inform, and promote. People can text the keyword to your account's sending number (a toll-free number) and you can set an automatic reply. You can find your account Sending Text number in Settings.

**NOTE:** In Simplified Alerts PLUS+, you must create a Distribution List to assign to your Keyword before you create the keyword. That way texters to your keyword are placed in a list.



In the example above, the keyword JOIN is added to the body of the message. The automated response is simple and informs users about the program with an option to Opt-Out.

### Using a Keyword for Enrollment and Promotion

You can sign-up/enroll subscribers through a keyword into a distribution list for information and marketing purposes.

## SimplifiedAlerts+

When someone texts to your keyword, they have officially opted-in to your list with their mobile phone number. But you might want more information like First Name, Last Name or Email to be stored with their contact record.

Later in this guide you'll see how to send a promotion with a link to a webpage or product link.

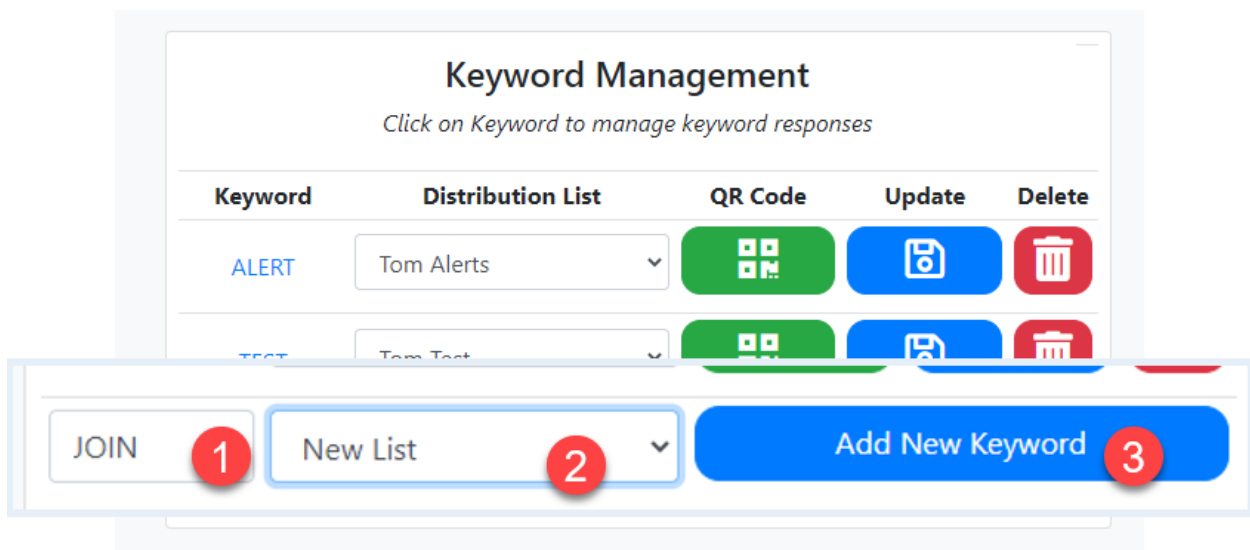
**NOTE:** All Simplified Alerts PLUS+ keywords come with a QR Code that you can share so subscribers can scan and sign-up.

Let's look at how to set-up keywords with Simplified Alerts PLUS+.

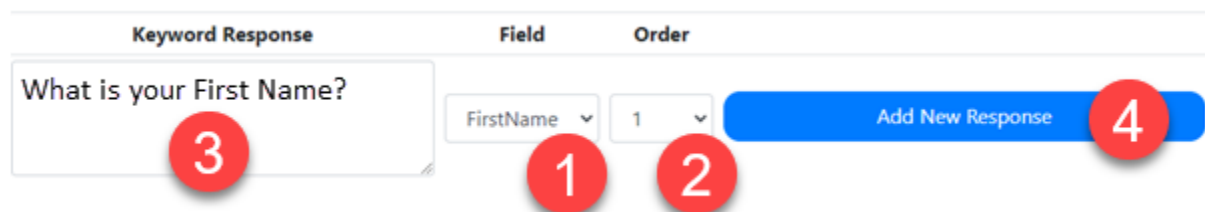
In Simplified Alerts PLUS+, click the Keyword Manager link in the left navigation to open the Keyword Manager screen.

Then,

1. Type in your keyword. Make sure there aren't any spaces. Try to keep it short and sweet.
2. Select the Distribution list that all subscribers through this keyword will be assigned to.
3. Click Add New Keyword to add your keyword.



NEXT, let's grab subscriber information from a keyword sign-up. We can capture First Name, Last Name and Email. This is good information to have, but not required.



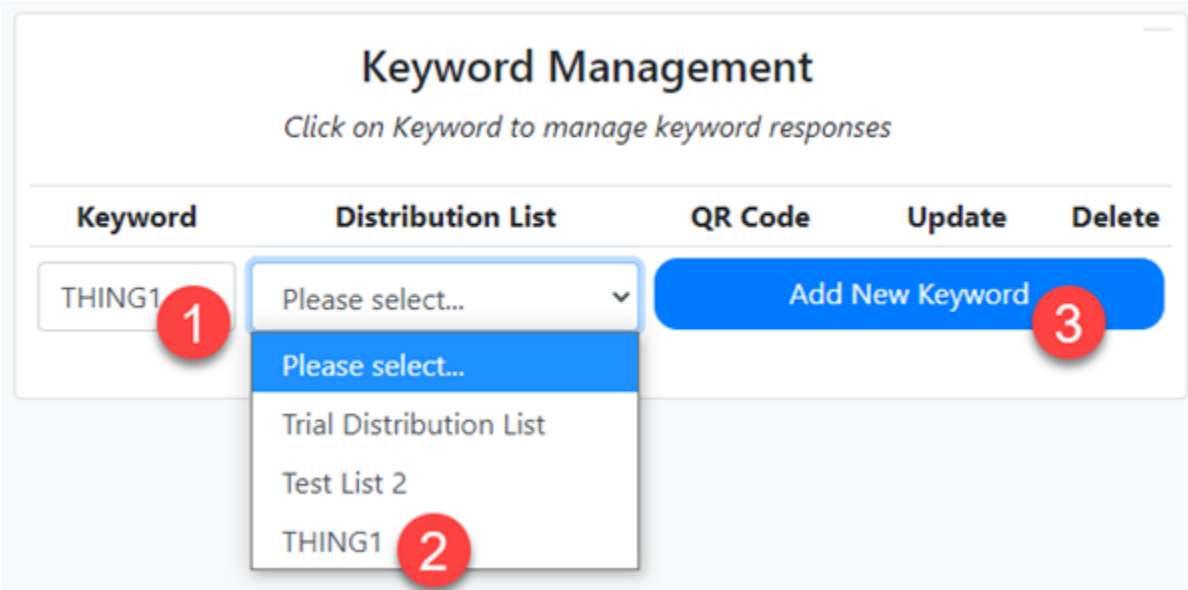
1. From the dropdown select FirstName, LastName or Email.
2. Select an Order (1 appears at the top, 3 appears below 1 and 2). Note: FirstName, LastName and Email is the expected 1,2,3 order.
3. Then type in text appropriate for the field. 'What is your First name? What is your Last Name? What is your Email?'
4. Then click Add New Response to activate it.

## Keywords for PROMOTIONS

You can have users text a keyword to your number and send back links and other information. This might be to help sell a product or service with a link and promo code. Example: Text THING1 to 833-555-1212.

Let's try it:

Set a reply using the Custom Field from the Field dropdown in your keyword set-up. First, you'll want to be sure that a Distribution List is configured to store the contacts that have enrolled through this keyword. It may be an existing list or a new list. If it's a limited promotion that you want to measure, you'll want to use a new list.



1. Create a Keyword.
2. Assign the keyword to a Distribution List.
3. Click Add New Keyword.

Now, you'll want to create the message that's sent back to the subscriber. It might be promotional and can include a link. See the example below.

The screenshot shows the 'THING1 Keyword Response Management' interface. It features a table with three columns: 'Keyword Response', 'Field', and 'Order'. In the 'Keyword Response' column, there is a text box containing the message: 'Get 10% off Thing1. Use PromoCode T1 on checkout. <https://amzn.to/3zkdyuY> ★'. In the 'Field' column, a dropdown menu is open, showing options: 'FirstName', 'LastName', 'Email', and 'Custom'. The 'Custom' option is highlighted. In the 'Order' column, the value '1' is entered. To the right of the table is a blue button labeled 'Add New Response'. A 'Back to Keywords' button is located at the top right of the interface.

1. Select Custom from the Field dropdown list.
2. Enter your message. In this example we are offering a promotional code to use on checkout along with a link to a product. Note : We used a shortened link that you can create to use less characters in the message (see <https://Bit.ly>).
3. Set the order. For most messages like this, it will be 1. But in some cases you may want to capture a name or email address too.
4. Click Add New Response.

Keyword Tips:

- Don't use spaces in your keyword. It's a single string of text, no spaces or other characters.
- Keep it short. Nobody wants to type in a long keyword.



## Distribution Lists

A Distribution List is a group of contacts. You can create an unlimited number of distribution lists in Simplified Alerts PLUS+. Distribution Lists can be connected to opt-in channels like Keywords, Online Sign-up pages, and contact imports. Think of a distribution list as a folder for a group of contacts.

You can create a distribution list by clicking on the Distribution Lists navigation from the left navigation.

### Working with Distribution Lists

1. Create a New List Name
2. Set the order. We recommend in increments of 5, with 5 appearing higher on a sign-up form than 10.
3. Click Add List to add.
4. Click the Signup Form checkbox for the Distribution List to appear on a Sign-up form. Uncheck it if you want it to appear private (only visible to administrators).
5. Click Update to save.

### Distribution Lists

You have 2 Distribution Lists

Select the checkboxes of the lists you want to display on your [Signup Form](#):

List Name	Signup Form	Order	Update	Delete
<input type="text" value="Trial Distribution List"/>	<input checked="" type="checkbox"/>	<input type="text" value="5"/>	<input type="button" value="Update"/>	<input type="button" value="Delete"/>
<input type="text" value="Test List 2"/>	<input checked="" type="checkbox"/>	<input type="text" value="10"/>	<input type="button" value="Update"/>	<input type="button" value="Delete"/>

New List Name:

Order:

**Tip:** You would uncheck the Sign-up form checkbox for a private list. This prevents Online Sign-up Page subscribers from selecting this Distribution List. You might want to make admins, executives, or others part of a private list.





## Importing Contacts

Simplified Alerts PLUS+ offers a robust importing tool. To import contacts, you'll need to upload a .csv file ([converting excel to csv](#)) with the following headers:

Client ID   Keyword   A/U/D   CountryCode   MobilePhone   Email   FirstName   LastName

Here's how the csv file should look (your values will fill-in rows 2+) :

	A	B	C	D	E	F	G	H
1	ClientID	Keyword	A/U/D (Add/Update/Delete)	Country Code	Mobile Phone	Email Address	First Name	Last Name
2	1232	LIST1	U	1	5554563460	sample1@companywebsite.com	Mike	Stevens
3	1232	LIST1	U	1	5558794531	sample2@yahoo.com	Diane	Johnson
4	1232	LIST1	D	1	5553567124	sampleemail@gmail.com	Bob	Miller
5	1232	LIST1	A	1	5555492344	test@simplifiedalerts.com	Jenny	Williams
6								

**ClientID:** Can be found on your Settings page.

**Keyword:** You must assign a contact list to a Keyword (which should already be assigned to a Distribution List). This is a critical step that must be completed.

**A/U/D:** Add / Update / Delete. A-Add is for new contacts, U-Update will overwrite an existing contact, and D-Delete will bulk delete *all* those contacts (from all lists).

**CountryCode:** 1 for US (Plus+ only currently support US text messaging).

**MobilePhone:** Mobile phone numbers of the contact. We prefer just digits, but our system will remove ( ) - . and other characters during the import process.

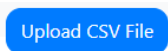
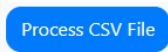

**EmailAddress:** The contacts email address.

**FirstName:** Contact first name. No spaces or commas.




**LastName:** Contact last name. No spaces or commas.

### Importing into Simplified Alerts PLUS +

Once your list is saved and ready to go, load it into your account.

1. Click on Upload CSV File 
2. Browse to find the file you want to import/upload.
3. Click on Process CSV File 
4. Next, you'll see a report on what we found out about your file. See explanations below.
5. Then, check the Certification / Acceptance box and click Import Contacts. 

## Explanations

	<p>Records with a green or yellow check mark icon will be updated/imported. These records will be imported, even with a warning.</p>
	<p>Records with a red garbage icon will be deleted. These records will not be added as contacts.</p>
	<p>Records with a safety hazard icon cannot be deleted. These are records that can't be deleted due to an account reason.</p>

**Note:** Simplified Alerts PLUS+ only allows opt-in contacts to be loaded into the system and assumes no liability if non-opt-in contacts are added by an account. Carriers like Verizon are very careful with the messages they send and to whom. It's important that you are confident that your contacts have given you permission to contact them by text.

### **Our Opt-In and Message-Sending Policy (must be accepted when importing contacts)**

You must have express consent from your recipients to send this message.

The Telephone Consumer Protection Act (TCPA) requires express written consent for text or voice solicitations sent to imported or manually added numbers. Per the ESIGN Act, the required signature may be obtained via email, website form, text, telephone key-press, or voice recording. Violations are subject to severe legal penalties.

For nonsolicitation messages, consent may be written or verbal but must be documented. The TCPA exempts some one-time text responses from legal disclosures and certain consumer-protection communications from consent requirements. Please refer to the FCC's TCPA Public Notice for details.

We document consent for contacts collected through our system. If you collect contacts outside our system, you must be able to supply proof of consent. You must also agree to the terms indicated in the Terms & Conditions, Privacy Policy and Import Agreement, all of which are subject to change.

The Cellular Telephone Industries Association (CTIA) requires disclosure of content type and messaging frequency. The number of messages per month should accurately reflect your intended messaging frequency. We recommend no more than four messages a month to avoid burdening subscribers. The CTIA also prohibits the following types of message content.

- Adult content (e.g., nude dancing clubs, escort services)
- Illegal or illicit drugs (e.g., marijuana)
- Alcohol, tobacco, or firearms
- Gambling
- Violence, hatred, or profanity
- Any product or service related to death (e.g., mortuaries and cemeteries)
- Any mention of any wireless carrier or any representation that copies or parodies any product or service of any wireless carrier.

This message is provided for informational purposes and in no way should be taken as legal advice.



## Add Contacts

This feature allows you to add contacts one at a time. See steps below.

1. Add the contact details. All fields are required.
2. Check the box to make the contact active; uncheck to make inactive.
3. Select the Distribution List(s) you'd like the contact to be associated with. If you do not add them to a list, they can only be sent a text when a message is sent to 'Everyone.'
4. Click Add Contact to finish.

### Add Contact

First Name:

Required

Last Name:

Required

Mobile Number:

Email Address:

Required

Password:

Required

Active:



Distribution Lists

Trial Distribution List:

Test List 2:

THING1:

List1:

Add Contact



## Send a Message

It's easy to send a message. Here are the step-by-step instructions.

1. Saved Message. Click to load a saved message (see details below).
2. Type or dictate your message. You have a total of 160 characters, and the countdown will show the remaining characters. NOTE: It's a best practice to keep the Organization at the start of each message and the Reply STOP to Cancel. You can type your message in-between each part by placing your cursor.

3. Click on Saved Message, Link (to add a shortened link), or Merge Field to incorporate first name or last name.
4. Check this box to send to everyone.
5. Click to send to select Distribution Lists.
6. Click to Schedule Message for sending in the future.
7. Click Send Message to send the message now.

The screenshot shows the 'Send Message' form with the following elements and callouts:

- 1:** 'Saved Messages' button in the top right corner.
- 2:** The main text input field containing 'TestingCo: Reply STOP to Cancel'.
- 3:** A row of three icons: a speech bubble, a link, and a right-pointing arrow.
- 4:** A checkbox next to the text 'Everyone:' in the 'Distribution List(s)' section.
- 5:** 'Select Distribution Lists' button with a question mark icon.
- 6:** 'Schedule Message' button with a question mark icon.
- 7:** The large blue 'Send Message' button at the bottom.

### Message Sending Tips:

- Try to leave about 5 or so characters in your countdown to be safe with the length of your message.
- Leave in Reply STOP to Opt-Out if you haven't messaged in a while. This allows folks to remove themselves if they no longer want to receive messages.
- Consider dictating the message if sending from your phone.
- Select a Saved Message if you want to quickly create a message.
- Consider loading scheduled messages in advance for reminders, inspirations or other bits of information.
- Your message will be sent to a short queue and can be viewed in the Alerts Center before and after it is sent.

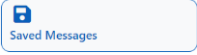


## Saved Messages

Create saved messages for easy access and quick sends. Each message is available from a dropdown menu from your Send Messages screen. Remember to keep them tight and concise.

<ol style="list-style-type: none"> <li>1. Enter a brief subject line.</li> <li>2. Click Add New Message.</li> </ol>	<div style="border: 1px solid #ccc; padding: 10px;"> <p><b>Saved Messages</b></p> <hr/> <div style="background-color: #4CAF50; color: white; padding: 5px; text-align: center;">Message Deleted!</div> <hr/> <p>Subject/Description:</p> <input type="text" value="Closed Today"/> <span style="color: red; font-weight: bold; border-radius: 50%; padding: 2px 5px;">1</span> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <span style="background-color: #2196F3; color: white; padding: 5px 15px; border-radius: 5px; display: inline-block;">Add New Message</span> <span style="color: red; font-weight: bold; border-radius: 50%; padding: 2px 5px;">2</span> </div>
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**TIPS:**

- All Saved Messages can be accessed from your Dashboard too. 
- Consider banking a handful of messages so you have them at the ready.
- Make sure each message is 130 characters or less. If the character count doesn't appear, you can use <https://wordcounter.net/character-count> to input your message and see the character count.



## Alert Center

The Alert Center is the Reporting hub for all of your messages and contact lists.

1. Alerts Reports. See Alerts in Queue (not sent) and all Alerts Sent from Queue.
2. Contact Reports. Here you can click to view:
  - a. All contacts in a Distribution List.
  - b. Inactive Contacts (contacts set to inactive by the admin).
  - c. Opt-Out Contacts. Contacts that replied STOP to opt-out.
3. Sent Messages. All messages sent through this account.

**Alert Center - Select a Report below**

- Messages in Queue 1
- Messages Sent From Queue
- Contacts in Trial Distribution List (1)
- Contacts in Test List 2 (0)
- Contacts in THING1 (0) 2
- Contacts in List1 (0)
- Inactive Contacts
- Opt-Out Contacts
- Sent Messages 3

In each of the reports, you'll have the options to export or print the data.

You can also search for contacts and display increments of 25 or all.

Excel
PDF
CSV
Print

Show  entries      Search:

**TIP:** Click on the Gray Bar to open the contents of the report. All contact reports will display all contacts in that Distribution List.



## Contacts

Want to see and manage all of your contacts? The Contacts center allows you to search, view, edit and export and print your contacts.

You can sort each of the columns by clicking on the Column Heading. You can also display contacts in increments of 25, or ALL in the Show entries dropdown feature.

### Contacts

Excel PDF CSV Print

Show 25 entries

Search:

ID	Last Name	First Name	Mobile Number	Email	Active	Date Added
89120		Tester	Tom	(312) 970-0596	tom@simplifiedsolutions.biz	Yes 2021-07-30

Showing 1 to 1 of 1 entries

Previous 1 Next

### Edit a Contact

You can edit contacts by clicking anywhere in the contact row.

You can Edit:

- First Name
- Last Name
- Mobile Number (include the 1)
- Email address
- Password

#### Edit Contact

First Name:

Last Name:

Mobile Number:

Email Address:

Password:

Edit Contact (ctd)

1. Change the Avatar. You can include pictures, make sure they aren't bigger than 50kb
2. Check to make the contact Active, unchecked to keep it in your contacts as inactive (won't receive a message).
3. Check to assign a contact to a Distribution List(s).
4. Click Update to save changes 1-3.
5. Send a Message to a Contact: Use this feature to send a 160 character or less message directly to a contact.
6. Click Send Message to send the message.
7. Delete Contact. Clicking this will remove the contact from your database.

The screenshot shows the 'Edit Contact' interface with the following elements and callouts:

- 1:** Avatar field with a circular icon containing 'RJ' and an 'Upload' button.
- 2:** 'Active' checkbox, which is checked.
- 3:** 'Distribution Lists' section with a list of lists: 'Trial Distribution List', 'Test List 2', 'THING1', and 'List1', each with an unchecked checkbox.
- 4:** A blue 'Update' button.
- 5:** 'Send A Message to this Contact' section with a text input field containing 'Enter Message Here...'.
- 6:** A blue 'Send Message' button.
- 7:** A red 'Delete Contact' button.

**TIPS**

- Use the Send a Message Feature to communicate directly with a contact. It's a quick way to text them directly rather than part of a group.
- Contacts can appear in multiple Distribution Lists. Remember you can control if a Distribution List appears on a sign-up page by visiting the Distribution Lists page.
- You may want to make a contact inactive if they leave for a period of time but expect to return.
- Delete the contact if they request to be removed or will no longer be associated with your organization.





## Dashboard

When you login, you'll see the Dashboard. Here is everything you need to know about it.

The screenshot shows the SimplifiedAlerts PLUS+ dashboard interface. At the top right, there are links for Support Desk (2), User Guide (3), and Logout (4). A system message (1) is displayed in a red banner. Below the message, the dashboard title 'Simplified Alerts PLUS+ Dashboard' is shown along with the Text Number: (833) 832-6343 (5). A welcome message 'Welcome, TestingCo!' is followed by the Message Credits: -400 (6) and a warning: 'You have a zero or negative balance, please contact support. SMS delivery is not guaranteed.' At the bottom, there is a grid of short-cut buttons (7) for Send Message, Contacts, Alert Center, Distribution Lists, Keyword Manager, Saved Messages, Settings, and Logout.

1. System Message. Here you'll see system updates about Simplified Alerts PLUS+ and other important messages.
2. Link to our Support Desk.
3. Link to the User Guide.
4. Logout.
5. Your Text Number. This is the number assigned to your account for sending messages. You can ask your subscribers to add the number to their contacts so they recognize the number.
6. Message Credits. This is your message credits balance.
7. Short Cuts. Here are short cuts to different account features like Send Message, Contacts and Logout.



## Contacting Support

We hope you enjoy Simplified Alerts PLUS+ and find it easy to use. Our support team is around to offer help every step of the way.

### Questions, Comments and Feedback.

Email: [support@simplifiedalerts.com](mailto:support@simplifiedalerts.com)

Call or text: 312-248-7405

Help Desk: <https://simplifiedalerts.force.com/s/>

## More Tips

### Tracking Links with Bit.ly

Simplified Alerts PLUS+ allows you to include links in all your messages, but with only 160 characters to work with, you need to keep them short. We include a link shortener with the Send Messages feature, but you might consider using Bit.ly for tracking clicks from links. This way you can measure engagement from your subscribers. While it may not be important for notifications, you might want to see how many clicks came from a promotion.

See <https://bitly.com/> to get started. The platform makes it easy to customize and track links.

### Permission to Communicate with Your Contacts

It's important that you have permission from your contacts to send them text messages. In the U.S., this practice is governed by the [TCPA Law](#). While we allow our vetted accounts to import contacts, it's important that your business / organization begin informing customers that you might communicate with them via text.

Simplified Alerts helps to keep your organization within TCPA compliance, but we rely on you to affirm that you have properly collected contacts and informed your members/customers of your messaging intentions.

In general, it's a good practice to note in all policies (and where you collect data) what you will do with collected data. We encourage you to have your policies reviewed periodically by your compliance and legal team.