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***BulkSMS.com***

***WEB 2 SMS***

***Product Manual***

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## **1. How to open your BulkSMS account**

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### **1.1. Register**

To open your BulkSMS account, all you need to do is:

- Step 1:** Go to [www.bulksms.com](http://www.bulksms.com).
- Step 2:** Choose your country.
- Step 3:** Click 'Register'.
- Step 4:** Fill in ALL your details on the registration form.
- Step 5:** Click 'Register'.

You are now ready to log in to your BulkSMS account. You will receive an SMS text message to your cellphone number with a short activation code that can be used to claim your five free credits.

### **1.2. Claim your free credits**

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click 'Claim them now' under the 'Commerce Centre' heading.
- Step 3:** Enter the 'Registration Code' exactly as it appears in the SMS text message you received.
- Step 4:** Click 'Claim'. You will receive the following status message: "5 credits have been added to your account."
- Step 5:** Click the 'My Account' link, at the top of the page, to return to your account home page.

If you did not receive your activation code please email [support@bulksms.com](mailto:support@bulksms.com) and request it. Please include your username and mobile/cell phone number in the email.

## ***2. How to add, edit and delete entries in your online phonebook***

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### ***2.1. Add, edit and delete individual members in your online phonebook***

#### ***2.1.1. Add an individual***

To add an individual or a mobile number to your BulkSMS online phonebook:

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click 'Phonebook Individuals' in the 'Online Phonebook' section.
- Step 3:** Click on 'Add new individual'.
- Step 4:** Enter 'First name' (must contain at least one character).
- Step 5:** Enter 'Surname' (must contain at least one character).
- Step 6:** Enter 'Mobile number' - (country code and number with no spaces or leading zero, e.g. 27820010001 for South Africa or 44123123456 for the UK).
- Step 7:** If you would like to add the individual to a predefined group, tick the 'Group' that you would like to add the individual to. Please note that you do NOT have to tick any group. To set up a group, see 2.2.1 below.
- Step 8:** Double check the details and Click 'Add individual'. The individual will now appear in your BulkSMS phonebook.
- Step 9:** Enter new customer details and 'Add individual' to add another customer to your online phonebook,  
OR
- Step 9:** Click 'Continue' to return to your list of individual customers.

#### ***2.1.2. Search for and edit an individual***

This feature allows you to search for individuals by Surname, First Name or Cellphone Number. You can then edit or delete the relevant phonebook entries. The page will display the first 100 individuals in your phonebook, sorted by Surname.

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click 'Phonebook Individuals' in the 'Online Phonebook' section.
- Step 3:** Enter the relevant information (i.e. name, surname or mobile number) in the 'Search for' field.
- Step 4:** Select the field you are using to search for from the drop down list. i.e. is it Surname, First Name or mobile number.
- Step 5:** Click 'Go' to start the search. The requested records will be displayed.

### **2.1.3. Edit or delete an individual**

Follow steps 1 to 5 of 2.1.2 above.

- Step 6:** To EDIT the relevant individual, click the mobile number of that individual. The 'Edit individual' page will then be displayed.
- Step 7:** Enter the details to be updated. (I.e. First Name, Surname or Mobile Number).
- Step 8:** You can add or remove the individual from a group by ticking or unticking the relevant groups.
- Step 9:** Click 'Update' to update the individual or 'Delete' to delete the individual from the phonebook entirely.

### **2.1.4. Quick delete individuals**

You can use this when you have a lot of individuals that need to be deleted as quickly as possible. You would do this by uploading a TEXT file with the relevant cellphone numbers of the individuals to your BulkSMS account.

- Step 1:** Create the Text File with one mobile number per line. (No more than 700 lines can be uploaded at any one time). Save the file as a \*.txt to an easily accessible place.
- Step 2:** Log in to your BulkSMS account, go to the 'My Accounts' page, Click 'Phonebook Individuals' in the 'Online Phonebook' section.
- Step 3:** Click 'Quick Delete'.
- Step 4:** Click 'Browse' to select the relevant Text File to upload from your computer. Once you have located the file select it and Click OK/OPEN.
- Step 5:** 'Default country code for numbers starting with zero' should be changed from the default if there are mobile numbers in your file that start with a zero. If you would like these numbers to remain, leave the drop down list as it is. To insert the country code automatically in the file, choose the relevant country from the drop down list. If, for example, you chose South Africa, all cellphone numbers in the file starting with 0 will be changed to start with 27. I.e. 0820010001 will be changed to 27820010001 or, if you chose United Kingdom, all cellphone numbers in the file starting with 0 will be changed to start with 44. I.e. 0123123456 will be changed to 44123123456.
- Step 6:** Click 'Upload' to begin uploading the file and deleting the records.

**PLEASE NOTE:** Each number found will be completely deleted. This means that they will be deleted from ALL your of your BulkSMS phonebook groups. The system will look for the mobile number and delete it from the BulkSMS phonebook.

- Step 7:** View the status of the file upload. The status will show you that the upload has been complete, and the mobile numbers have been deleted out of your phonebook. Click the 'My Account' link at the top of the page to return to your account home page.

## **2.2. Add, edit and delete groups in your online phonebook**

Why use groups? Having groups in your phonebook allows you to specify which sets of customers/clients you would like your SMS to go to. For example, in a school situation, the parents of the Grade 8 students could be in one group and the parents of the Grade 9 students could be in another. In a corporate environment, the members of various loyalty groups may be segmented into the different groups to enable you to send them targeted messages.

### 2.2.1. Add a group

To add a group to your BulkSMS online phonebook, all you need to do is:

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click 'Phonebook Groups' in the 'Online Phonebook' section.
- Step 3:** In the 'New Group' field replace "your\_group\_name" with the desired name of the new group , e.g. "June Workshop" or "Grade 8 Parents".
- Step 4:** Click 'Add'. The new group you have created will now be listed under 'Group Name'.

Repeat the steps above to create more groups.

### 2.2.2. Edit group details

When editing the actual details of the group, you can change the group name, upload new group members or download existing group members.

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click 'Phonebook Groups' in the 'Online Phonebook' section.
- Step 3:** Click the group you want to edit.
- Step 4:** EDIT the 'Name' field to change the name of the group.

'Group Members' lists the current individuals in the group. You can edit the individual members by selecting the mobile number, or you can delete selected members by ticking the relevant boxes and clicking 'Remove selected'.

### 2.2.3. Add or delete group members

This is where you can add or delete group members. It allows you to choose a group and then displays the individuals not in that group or the individuals not in any group.

To edit a group:

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click 'Phonebook Groups' in the 'Online Phonebook' section.
- Step 3:** Click 'Quickedit'.
- Step 4:** Choose 'Display all individuals not in the current group' or 'Display only individuals who are not in group'. The selected individuals will be displayed in the block on the left hand side.
- Step 5:** Select the 'Group' from the drop down list that you want to add to or delete from.
- Step 6:** Click 'Go' to display requested information. The members of this group will be displayed in the block on the right hand side.
- Step 7:** First select the individual, hold down the Shift key and use the mouse to select multiple individuals adjacent to each other or hold down the Ctrl key and use the mouse to select individuals that are not adjacent.
- Step 8:** Click '>>' to add to, or '<<' to delete from the group.

Individuals can also be completely deleted from this page. To do this, Click 'Delete selected' to remove the selected individual from ALL groups and ENTIRELY from the phonebook.

### 2.2.4. Delete phonebook groups

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click 'Phonebook Groups in the 'Online Phonebook' section.
- Step 3:** Click the group you want to delete.
- Step 4:** Click 'Delete this group'.
- Step 5:** 'Group name' displays the name of the group to be deleted.
- Step 6:** If you want to remove the individuals from your online phonebook completely, tick this box, if not, leave it unticked. **PLEASE USE CAREFULLY** - this option will remove individuals **COMPLETELY** from your phonebook - even if they are in multiple groups.

### 2.2.5. Upload a database

When uploading multiple individuals to your BulkSMS phonebook, you will need to use a Text (Tab delimited) File. (Remember, your excel spreadsheet can be saved as a Text file). Please note that there may not be more than 20,000 lines/entries in the text file. Should you have a group larger than this, you will need to split it up into units of 20,000, alternatively, you can use the BulkSMS Text Messenger, our desktop messaging program which offers you the facility to upload groups of up to 100,000 contacts at a time.

Your 'Group Text (Tab delimited) File' is flexible but must contain Mobile number, First name and Surname. This is the default field order, but a different order can be selected to match the file if it was previously set up and doesn't follow these conventions.

It is recommended to enter cellphone or mobile numbers with the country code (i.e. +27 for South Africa or +44 for the United Kingdom) and number with no spaces or leading zero, e.g. 27820010001. If the number starts with zero, and not a country code, the default country code can be added during the upload. The First name and Surname must contain at least one character.

The default file will be formatted as follows:

First Column: Cellphone number	Second Column: First name	Third Column: Surname
447700000001	X	X
27820000000	John	Smith
27820000002	A	B

This will come out as: *cell\_number(TAB)first\_name(TAB)Surname* in your Text file. To upload a file from your computer to your online phonebook:

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click 'Phonebook Groups under the 'Online Phonebook' section.
- Step 3:** Click the group you want to add the database to.
- Step 4:** Click 'Upload' group members.
- Step 5:** Click 'Browse' to select the 'Group Text (Tab delimited) File' to upload from your computer. Once you have located the file select it and click 'Open'.
- Step 6:** Click 'Next' to begin uploading the file.
- Step 7:** A status of the file upload will be displayed. Check that the numbers shown match the expected numbers in the file that you are uploading.

- Step 8:** Link each column to the correct heading – cellular number, first name or Surname.
- Step 9:** Choose the relevant country code.
- Step 10:** Click 'Next'.
- Step 11:** This screen will show the details of your upload. Choose the group that you would like to add the contacts to. Please remember to check that the uploaded numbers are correctly formatted. A message to a mobile number that begins with a 7, for example, will be sent to Russia for delivery and you will be charged for this.
- Step 12:** Click 'Next'.

You should be returned to your groups' page where you can select your group and double check that the contacts have been added.

### **2.2.6. Download a database**

To download an online phonebook group that you have previously set-up to a Text (Tab delimited) File. (ie. save a phonebook group to your computer)

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click 'Phonebook Groups' under the 'Online Phonebook' section.
- Step 3:** Click the group you want to download.
- Step 4:** Click 'Download group members'.
- Step 5:** Click 'Please click here to begin your download'.

If the group is large you will see a message along the lines of: "This is a large group, with (xxxx) members - please be patient. Do not stop the download process if it takes a long time." It will tell you that: 'The file you are going to download is in the following format: mobile number (TAB) first name (TAB) surname (with one such record per line).

- Step 6:** Click Open to open and view the file, or Save to save it.
- Step 7:** When clicking Save to save the file, a dialog box will appear. Choose where you want to save the file and verify the file name. Click Save/Enter. The file will be saved as a .csv. You will be able to open this file using either Notepad or Microsoft Excel.
- Step 8:** Click on 'My Account' to go back to your accounts page.

## 3. How to send an SMS

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### 3.1. How to send a message to an individual

In this section we provide a step by step guide to take you through the process of sending an SMS text message to one or more individuals in your contact list.

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click 'Send messages to individuals' under 'Send SMS'.
- Step 3:** Enter the mobile number of the 'Recipient', (country code and number with no spaces or leading zero, e.g. 27820010001 for South Africa or 44123123456 for the UK) or Click 'from phonebook' to use numbers already in phonebook.
- Step 4:** To send a new message, type up to 160 characters in the 'Message' box. The 'Characters left' box will show the number of characters, up to 160, that can be added to the message. The number of characters left will automatically update as the message is typed. Should you wish to save this message in order to send it again at a later stage, Click 'Save msg'.

If you would like to send a long message, you can tick the 'Long Message' tick box. Long messages do cost more. For example, if your message is three messages (or parts) long, you will be charged three times the normal rate of sending an SMS text message.

When 'Use tagline discount' is checked, the text " via: bulksms.com" will be added to your message. The tagline will reduce the number of characters available for the message by 17 characters.

'Send as Unicode' is checked when sending messages of a non-European language. This allows for a maximum SMS of 70 characters.

- Step 5:** If you wish to check the cost, click 'Confirm cost' to see current your current credits available and the cost to send the text message.
- Step 6:** Click 'Send now' to send the SMS text message. A confirmation note indicating that your SMS text message has been sent will appear.

### 3.2. How to send a message to a group

This section shows you how to send a message to one or more groups.

It is RECOMMENDED that you send a test message prior to sending the message to groups.

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click 'Send messages to a group' under 'Send SMS'
- Step 3:** To send a new message, type up to 160 characters in the 'Message' box. The 'Characters left' box will show the number of characters, up to 160, that can still be added to the message. Should you wish to save this message in order to send it again at a later stage, you can Click 'Save msg'.

If you would like to send a long message, you can tick the 'Long Message' tick box. Long messages do cost more. For example, if your message is three messages (or parts) long, you will be charged three times the normal rate of sending an SMS text message.

When 'Use tagline discount' is checked, the text " via: bulksms.com" will be added to your message. This will provide a 25% discount. The tagline will reduce the number of characters available for the message by 17 characters.

'Send as Unicode' is checked when sending messages of a non-European language. This allows for a maximum SMS of 70 characters.

- Step 4:** 'Recipient groups' show all the current groups you have entered into the system. Tick the 'groups' to which you want the message sent.
- Step 5:** If you wish to check the cost, Click 'Confirm cost' to see your current credits available and the cost to send the message.
- Step 6:** Click 'Send now' to send the message. A confirmation note indicating that your SMS has been sent will appear.

Please note: The message will only be sent to the first 20,000 group members. This means that each group may NOT have more than 20,000 members.

### **3.3. How to send a personalised message**

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click 'Send messages to a group' under 'Send SMS'
- Step 3:** To send a new message, type up to 160 characters in the 'Message' box. The 'Characters left' box will show the number of characters, up to 160, that can still be added to the message.
- Should you wish to save this message in order to send it again at a later stage, you can Click 'Save msg'.
- Step 4:** If you would like to personalize your SMS text message, you can Click 'Add Name'. This will insert the text from the first name field in the phonebook into the message. For each number the message is sent to, the system will insert up to 11 characters of the corresponding first name (this means that only the first 11 characters of the first name will be included).

OR

- Step 4:** Click 'Add Surname' to insert the text from the surname field in the phonebook into the message. For each number the message is sent to, the system will insert up to 9 characters of the corresponding surname (this means that only the first 9 characters of the surname will be included).
- (Please note that there are a maximum of 20 characters available for the name and/or surname fields and if the length of the SMS text message is too long, the surname field will be trimmed first, followed by the name field).

If you would like to send a long message, you can tick the 'Long Message' tick box. Long messages do cost more. For example, if your message is three messages (or parts) long, you will be charged three times the normal rate of sending an SMS text message.

When 'Use tagline discount' is checked, the text " via: bulksms.com" will be added to your message. This will provide a 25% discount. The tagline will reduce the number of characters available for the message by 17 characters.

'Send as Unicode' is checked when sending messages of a non-European language. This allows for a maximum SMS of 70 characters.

- Step 5:** 'Recipient groups' show all the current groups you have set up on the system. Tick the 'groups' to which you want the message sent.
- Step 6:** If you wish to check the cost, Click 'Confirm cost' to see your current credits available and the cost to send the message.
- Step 7:** Click 'Send now' to send the message. A confirmation note indicating that your SMS text message has been sent will appear.

Reminder: The message will only be sent to the first 20,000 group members. This means that a group must be limited to 20,000 members.

### 3.4. *How to send message from a file upload*

You can send many different messages to many different individuals through a file upload. To do this:

**Step 1:** Create a Text (Tab delimited) File. This should contain the relevant mobile phone number and each unique message. If you are not sending unique messages to different individuals then you should rather 'Send messages to a group'.

Create your 'Multi-Message Text (Tab delimited) File'. This file must be in the format: cellular or mobile phone number(TAB)message. It should have only one record per line. It is best to enter mobile numbers with a country code. (If the number starts with zero, not a country code, the default country code can be added during the upload).

When typing the message in the file, please note that only the first 160 characters (excluding the mobile number that the message will be sent to) of the message will be uploaded. The recipient will not receive anything more than 160 characters.

**Step 2:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.

**Step 3:** Click 'Send multiple messages from a file upload' under 'Send SMS'.

**Step 4:** Click 'Browse' to select the 'Multi-Message Text (Tab delimited) File' to upload from your computer. Once you have located the file select it and click 'Open'.

**Step 5:** Click 'Upload' to begin uploading the file. This does NOT send the message.

**Step 6:** A status of the upload will be displayed. Verify that the actual numbers match the expected numbers.

**Step 7:** If you would like to schedule the message to be sent at a later stage – Tick 'Schedule this message'.

**Step 8:** If you wish to check the cost, Click 'Confirm cost' to see current credits and the cost to send the message.

**Step 9:** Click 'Send now' to send the message. A confirmation note indicating that your SMS has been sent will appear.

Please note: The maximum number of messages that can be in a file for upload via the Browser is 13,000. This means that there may be no more than 13,000 lines.

### 3.5. *How to send a scheduled message*

**Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page and click on either 'Send Messages to Individuals', 'Send Messages to a Group', or 'Send Multiple Messages from File Upload' under the 'Send SMS' heading.

**Step 2:** After typing in or uploading your message tick the box that says 'Schedule this message?'

**Step 3:** Enter/Select the date and time for the scheduled message to be delivered. Type or use the calendar to specify the time and date that you want the message to go out. The date/time is set according to the time zone that your account is configured for.

**Step 4:** Type a description for the scheduled message which will be shown in the scheduled message history to help you identify your scheduled messages.

**Step 5:** Click 'Send Message'. You will be told that 'Your message has been scheduled for later sending.' The credits for your scheduled message will be deducted as soon as you have clicked 'Send message'. You can check the cost of sending this message by clicking on 'Confirm Cost'.

### 3.6. How to send to groups from your mobile phone

(Only available in South Africa and the United Kingdom)

Please see paragraph 6.3 below to enable 'Mobile2Group' sending.

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click on 'Phonebook Groups' in the 'Online Phonebook' section.
- Step 3:** Click on 'Group name' to select the group you wish to send to with Mobile2Group.
- Step 4:** In 'Edit Group' find the 'Group Id' heading and write down the number that is next to the heading (e.g. 12340). The Group Id must be included as the first characters of the SMS text message that you will send to Mobile2Group.

You are now ready to send the SMS text message from your mobile phone to your contacts using Mobile2Group. To send the SMS text message from your mobile phone, follow the rest of the steps:

- Step 5:** Create a new SMS text message on your mobile phone (this must be sent from the mobile phone number that you entered in the 'Allowed mobile numbers' section).
- Step 6:** Enter the 'Group Id' number, a space, and then the message (e.g. "57957 Reminder: staff meeting at 9am on 12 July").
- Step 7 (South Africa only):** Send the SMS text message to 32018. This will cost R1.00 to send the SMS to this short code number. The message will be sent to your group and will be recorded in the message history of your account.

For ease of use, save the Mobile2Group number (32018) to your cell phone.

- Step 7 (UK only):** Send the SMS text message to 077 978 03200. To send an SMS text message to this short code number will cost the same as a standard text message. The message will be sent to your group and will be recorded in the message history of your account.

For ease of use, save the Mobile2Group number (077 978 03200) to your cell phone.

We suggest you test the Mobile2Group service by sending an SMS from your cellphone to a small group of 2 or 3 contacts. Use the steps above to enable Mobile2Group. Include your cell phone number in the phonebook group.

The successful receipt of the message in your cell phone's SMS inbox will confirm that the Mobile2Group service has sent the SMS to your contact group.

### 3.7. How to save a message

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click 'Send messages to a group' or 'Send messages to individuals' under 'Send SMS'
- Step 3:** To save a new message type the SMS text message in the 'Message' box.
- Step 4:** Click 'Save msg'

Once you have saved the message, the message box will be automatically cleared in order for you to type a new message.

### **3.8. How to retrieve and send a saved message**

This section shows you how to retrieve and send a saved message.

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click 'Send messages to a group' or 'Send messages to individuals' under 'Send SMS'
- Step 3:** Enter the mobile number or choose the group that you would like your SMS text message to be sent to.
- Step 4:** Use the drop down arrow to choose the SMS text message you would like to send.
- Step 5:** Click 'Send now'.

### **3.9. How to delete a saved message**

This section shows you how to delete a previously saved message.

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click 'Send messages to a group' or 'Send messages to individuals' under 'Send SMS'
- Step 3:** Use the drop down arrow to choose the saved SMS text message you would like to delete. This should show in the 'Message' block below.
- Step 4:** To delete the message completely, Click 'Delete Msg'. This will permanently remove the currently displayed message from your BulkSMS account

## 4. *How to view sent messages and replies*

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### 4.1. *View Inbox*

To view any replies to the messages that have been sent:

**Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.

**Step 2:** Go to the 'Folders' section and Click 'Inbox'.

This displays all replies and the following information about each reply: From, Message, Received and In reply to.

**Step 3:** Click the 'M' in the 'In reply to' column to see the original message sent to the recipient. Please note that replies (incoming messages) are kept indefinitely, but the related message which was replied to is only available for 30 days.

### 4.2. *Download Inbox*

To download the messages in the Inbox of your BulkSMS account, you need to:

**Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.

**Step 2:** Click 'Download Inbox' under the 'Folders' section.

**Step 3:** Enter the start date of the report you would like in the following format: Year, Month and Date (YYYY-MM-DD)

**Step 4:** Enter the end date of the report in the following format YYYY-MM-DD

**Step 5:** Click Generate to access the report of messages sent during the selected period.

**Step 6:** Click the link 'Click here' to view the message inbox report or right-click and choose 'Save as' to save. A Text (Tab delimited) File will be downloaded to your computer. The format will show: Date/time (TAB) Sender (TAB) recipient (TAB) Message.

### 4.3. *View scheduled message*

To view all messages that have been scheduled, follow these steps:

**Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.

**Step 2:** Click 'Scheduled Messages' under the 'Message History' heading.

**Step 3:** This shows a list of all your scheduled messages. Click the 'Send time' field to view the details of the scheduled message

**Step 4:** The time and date of scheduled message will be displayed. Click 'Delete' to delete the scheduled message.

### 4.4. *View message history*

To view a history of all the messages sent from your BulkSMS account within the last 30 days and the delivery status of each, follow the steps below:

**Step 1:** Log in to your BulkSMS account and go to the 'My Account' page

**Step 2:** Go to the 'Message History' section and Click 'View message history'.

**Step 3:** Click on the 'Details' of the message you wish to view.

- Step 4:** View the message history. This page will show you the actual message sent as well as whether or not it was delivered.
- Step 5:** Click on 'My Account' to go back to your accounts page.

#### **4.5. Download message history**

To download a history of all the messages sent and the delivery status of each, follow the steps below:

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Go to the 'Message History' section and Click 'Download message history'.
- Step 3:** Enter the start date of the report you would like as year, month and day (YYYY-MM-DD)
- Step 4:** Enter the end date of the report as year, month and day (YYYY-MM-DD)
- Step 5:** The file download will contain: Created time, MSISDN (Cellular or mobile phone number of the recipient) and the status code of the message. Should you need any further information, Tick any of the optional fields.
- Step 6:** Click Generate Download File to download the messages.
- Step 7:** On this page you will find a list of all the delivery status codes. Click the link 'Click here' to check whether or not your report has been generated.
- Step 8:** Once the report has been generated, Click 'from here' to view or right-click and choose Save As to save the file. A Text (Tab delimited) File in the format of Date/time(TAB)recipient(TAB)Status code will be downloaded to your computer.

Please note that the message history is only kept for 30 days. If you want to keep records of all sent messages, please download your message history on a monthly basis

## 5. *Payments and Invoices*

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### 5.1. *Buy Credits using a Credit Card*

In order to send SMS text messages to colleagues, customers, friends or family, you will need to purchase credits.

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click 'Buy Credits' under the 'Commerce Centre' heading
- Step 3:** Choose the number of credits you want to buy from the drop down menu.
- Step 4:** Choose 'Credit Card' as your payment method
- Step 5:** Click 'Continue'
- Step 6:** Confirm the transaction details by Clicking 'Purchase Credits'
- Step 7:** The screen will go to the WorldPay website. Choose the Credit Card type you wish to use (i.e. Visa or MasterCard)
- Step 8:** Enter both the 'card' and 'cardholder' details.
- Step 9:** Click 'Make Payment'.
- Step 10:** Confirm the payment details.
- Step 11:** Click 'Continue' to return to your BulkSMS account

You will also receive an email confirming your transaction.

### 5.2. *Buy credits using PayPal*

In order to send SMS text messages to colleagues, customers, friends or family, you will need to buy credits. To buy credits using the PayPal system:

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click 'Buy Credits' under the 'Commerce Centre' heading
- Step 3:** Choose the number of credits you want to buy from the drop down menu.
- Step 4:** Choose 'PayPal' as your payment method
- Step 5:** Click 'Continue'
- Step 6:** Click the PayPal logo
- Step 7:** Confirm the Unit Price
- Step 8:** Update the Totals
- Step 9:** Create a PayPal account if required or log in to PayPal
- Step 10:** Follow the PayPal process as per all other payments

### **5.3. View invoices for all purchases**

You can view the invoices issued for all your online purchases, all you need to do is:

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click 'View Invoices' under the 'Commerce Centre' heading
- Step 3:** This will show a list of all invoices. To view one, Click on the 'invoice number'. This will bring up the invoice for you to view and/or print.
- Step 4:** Click on 'My Account' to go back to your accounts page.

### **5.4. Buy credits by depositing or transferring of funds**

In order to send SMS text messages to colleagues, customers, friends or family, you will need to buy credits. To purchase credits by depositing funds or paying via an electronic funds transfer:

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click 'Buy Credits' under the 'Commerce Centre' heading
- Step 3:** Choose 'Bank Deposit' as your payment method
- Step 4:** Click 'Continue'
- Step 5:** Gather the information you need from the page in order to be able to transfer or deposit the funds as per the number of credits you wish to buy.

Please note that you may request an invoice and it will be faxed / emailed to you. Please email invoice requests to [admin@bulksms.com](mailto:admin@bulksms.com).

### **5.5. View Credit History**

To see a list of credits bought and used per day, you can follow these steps:

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click 'Credit History' under the 'Commerce Centre' heading
- Step 3:** View all the credits bought and their relevant Invoices, as well as when they were used.

To view an invoice you can click on the highlighted invoice in the 'Linked Document' column.

## 6. *How to use advanced features*

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Enabling advanced features below will give you extra options on other parts of the site

- **Purge failed numbers:** Lets you remove numbers from your phonebook which have received failed status reports a specified number of times.
- **Delivery Summary Report:** Receive a weekly email summary of messages sent.
- **Mobile2Group:** Enables you to send a Message to a Group defined in your Phonebook via Mobile Phone (send message to a group from your mobile).
- **Credit Sponsor:** Lets you sponsor other users with credits.
- **Transfer Credits:** Transfer credits to another user's account (required to resell credits).
- **Auto Response:** Send automated replies to incoming messages. You may configure auto responses here
- **Opt-in groups:** Lets users subscribe/unsubscribe to a group, by opting in or out via SMS, to receive messages from you.
- **Blocked numbers:** Manage the numbers which you cannot send messages to.

### 6.1. *Purge failed numbers*

This can be used to maintain your phonebook groups by allowing you to purge numbers in your phonebook based on a chosen number of consecutive SMS delivery failures. Upon running this feature, the numbers are moved to a special 'Failed number' group for future deletion or correction as needed. To keep your phonebook up to date follow the instructions below.

#### 6.1.1. *Enable purge failed numbers*

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click 'Other features' under the 'Advanced features' section
- Step 3:** Tick 'Purge failed numbers'
- Step 4:** Click 'Update' button.
- Step 5:** Click the 'My Account' link at the top of the page to return to your account home page.

#### 6.1.2. *Separate and delete purged failed numbers from your groups*

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click 'Phonebook Groups'
- Step 3:** You will see a group called 'Failed Numbers (update)'. Click the 'update' link.
- Step 4:** Specify the number of consecutive failures that you would like to use to classify numbers as permanently 'failed'. I.e. how many times you would like to try sending to the customer, and thereafter no more attempts must be made. (Note: Take into consideration how often you send to the group and that failed messages will be charged for.)
- Step 5:** Tick which groups you would like to remove the purged numbers from.
- Step 6:** Click 'Purge' button (Note: The total number of purged numbers will be displayed near the top of the page.) Repeat as desired. These numbers will now appear in a group 'failed numbers'.
- Step 7:** If you would like to delete these numbers from your groups, click 'Clear old numbers'.

- Step 8:** The screen will change, Click 'Delete' to completely remove all of the previously purged numbers from the 'Failed Numbers' group. Remember: "All failed numbers which you previously purged will now be completely removed, including their associated individuals."
- Step 9:** Click 'My Account' link, at the top of the page, to return to your account home page.

## 6.2. *Delivery Summary report*

To receive a weekly summary email detailing the number of messages sent and received along with a breakdown of how many messages were delivered you will need to:

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Go to the 'Advanced Features' section and Click 'Other features'.
- Step 3:** Click 'Delivery Summary Report'
- Step 4:** Tick the 'Receive the weekly email summary' box
- Step 5:** Choose which day of the week you would like to receive the report
- Step 6:** Enter the email address that the report needs to go to
- Step 7:** Click 'Submit' to save the data
- Step 8:** Click 'My Account' to go back to the main menu

## 6.3. *Enable Mobile2Group setting*

(Only available in South Africa and the United Kingdom)

This feature makes it possible for you to become truly mobile by allowing you to send SMS text messages to your BulkSMS phonebook groups using a mobile phone. Once enabled you will be able to send an SMS text message to 32018 in South Africa and 077 978 03200 in the UK and this will be forwarded to a specified BulkSMS phonebook group.

To enable this feature:

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Go to the 'Advanced Features' section and Click 'Other features'
- Step 3:** Tick the 'Mobile2Group' box
- Step 4:** Click the 'Update' button.
- Step 5:** Click on the 'My Account' link at top of page to return to your account page.

## 6.4. *Credit Sponsor and Credit Transfer*

### 6.4.1. *How to sponsor a BulkSMS account*

It is possible to sponsor credit usage on other BulkSMS accounts from your BulkSMS account. An example of where this is useful is if you have a business in which several people have BulkSMS accounts, and you want to manage the purchasing and usage of credits from one central BulkSMS account. This feature is called the Sponsor feature. This means that the central/main account will sponsor the use of credits on sub-accounts.

Each of the people who need to send SMS text messages in the business will need to have opened their own BulkSMS account. The credits used on these accounts are deducted from one central account. A quota for each sponsored account can be set on the primary account. The Primary account can also see the message history of the sponsored accounts. The assumption is made that the BulkSMS accounts that you want to work with are already in existence.

Setting up the Primary account:

- Step 1:** Log in to the BulkSMS account that will be the primary account, which would sponsor the sub-accounts.
- Step 2:** Click on 'Other features', under the 'Advanced Features' section.
- Step 3:** Tick 'Credit Sponsor' box
- Step 4:** Click on 'Update'
- Step 5:** Click on 'My Account' at the top of the page to return to the main menu
- Step 6:** Click on 'Sponsor Credits' under 'Commerce Centre'.
- Step 7:** Click 'click here' on the link shown to add consumers/sub accounts to the list of accounts you wish to sponsor.
- Step 8:** TYPE in the BulkSMS account username that you wish to sponsor. Note that it is case sensitive. Select the number of credits per month that you would like to sponsor this account, and type a message to the account holder if necessary.
- Step 9:** Click on the 'Offer' button.

If you want to add another sub-account, click on 'Add consumer' at the top of the web page and repeat steps 6-9 above

### **6.4.2. How to accept your Primary account as your Credit Sponsor**

- Step 1:** The owner of the account to be sponsored should log into his/her BulkSMS account. There will be a new link shown on the 'My Account' page called 'View Credit Sponsor'.
- Step 2:** The information on the sponsorship is shown. ACCEPT or REJECT the sponsorship as desired.

The sponsored account can now start sending.

Please note the following:

The agreement to sponsor/consume credits can be revoked at any time by either the Primary account holder or the Sponsored account holder.

If an account accepts a sponsorship, the message history on that account is visible to the primary account.

The monthly quota set by the primary account holder can be changed at any time.

If a sponsored account uses up credits to the level of the monthly quota and the quota is not increased by the primary account, it can purchase more credits in the normal way by clicking on the 'Buy Credits' link on the 'My Account' page.

### **6.4.3. Transfer credits:**

To enable the Transfer credits feature, please email [support@bulksms.com](mailto:support@bulksms.com) and request it. Once this is enabled you will need to do the following in order to transfer credits to another BulkSMS account:

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click 'Transfer Credits' under the 'Commerce Centre' Section
- Step 3:** Enter the username of the Account to which you want to transfer credits
- Step 4:** Enter the user ID of the account to which you want to transfer credits (this can be found under the 'Update your profile' link under the 'My Profile' section on the 'My Accounts' page of the BulkSMS account you wish to transfer credits to)
- Step 5:** Enter the number of credits you wish to transfer
- Step 6:** Enter a comment (if needed)
- Step 7:** Click 'Transfer'

## 6.5. Enable Auto Response

This feature allows you to send automated messages to a mobile user as a response to an incoming message. It is usually created for Premium Rated short code campaigns (only available in South Africa and the United Kingdom). You need to set up a default response message and choose other responses as necessary.

The cost of an automated response message is the same as sending a normal message. ie. if one message equals 1 credit, 1 response message will equal 1 credit.

**Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page. Click 'Other features' in the 'Advanced Features' section.

**Step 2:** Tick the checkbox next to 'Auto Response'

**Step 3:** Click on the 'Update' button. You are now able to set up an automatic response.

**Step 4:** Click 'My Account' at the top of the page to return to the main menu

You will not need to go through steps 1 to 4 again. If you would like to change your auto response at any time, simply follow the steps from step 5.

**Step 5:** Click 'Auto Response' under the 'Folders' heading.

**Step 6:** Enter a message to be sent to the customer should the response that they send be invalid (i.e. not a response that has been requested).

**Step 7:** Enter the email address that you would like ALL responses to go to.

**Step 8:** Enter a key word or phrase that the consumer needs to send in order to receive the next message

**Step 9:** Enter the message that the customer will receive once they have sent the key word or phrase above. (e.g. thank you for your response. You have sent the correct key word, you will now be entered into the draw).

**Step 10:** You can have up to ten keywords with various responses. The rest would be entered in the same way as Step 8 and Step 9, under the 'Rule' blocks.

**Step 11:** Click Save

**Step 12:** Click 'My Account' at the top of the page to return to the main menu.

## 6.6. How to send an automatic response

An Automatic response can be used to gather information about your database. You could ask your respondents a question, which they answer and in return a second, third, up to ten responses can be sent to the recipients' cellular/mobile phone— asking more questions, or giving the customer more information.

For example, you would like to give customers free samples of your product. In order for the customer to be eligible for the sample, they need to answer a few questions. An SMS text message would be sent to the customer requesting their participation, and telling them of the rewards. Each response i.e. yes or no, could receive a second message giving further instructions, or asking another question.

**Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.

**Step 2:** Click 'Auto Response' in the 'Folders' section.

**Step 3:** Enter a message to be sent to a recipient should the response that they send be invalid (i.e. not a response that has been requested).

**Step 4:** Enter the email address that you would like ALL responses to go to.

**Step 5:** Enter a key word or phrase that the consumer needs to send in order to receive the next message

**Step 6:** Enter the message that the customer will receive once they have sent the key word or phrase above. (e.g. thank you for your response)

**Step 7:** Click Save

**Step 8:** Click 'My Account' at the top of the page to return to the main menu.

You can have up to ten keywords with various responses. They would be entered in the same way as in Step 6 to 9, in the rule 2 to rule 10 blocks.

## **6.7. Enable your opt-in group (only available in South Africa and the United Kingdom)**

This feature enables the people to whom you want to send SMS messages to automatically add their number to your web based BulkSMS address book by sending an SMS from their cellphone.

The typical process of adding numbers to your address book is to ask people for their numbers, write them down, type them up in a spreadsheet, and then manually upload the spreadsheet to your online BulkSMS phonebook group. By using the Opt-in Group feature you can simply ask people to send an SMS to join your group.

To set-up your opt-in group, follow these steps:

**Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.

**Step 2:** Click on Other Features (under Advanced Features).

**Step 3:** Click on Opt-in Groups.

**Step 4:** Give your service a name

**Step 5:** Give your service a brief description

**Step 6:** Click 'Enable' to create your Opt-in Group

Instructions for joining your group will be shown.

You can then tell the people who want to join your group how to do so through announcements, notices, adverts etc.

**Please note** that each new member will pay R1 for the SMS message sent requesting the group membership. This is slightly more than the cost of sending a standard rate SMS and the extra revenue is used to send a reply message to confirm to the new member that he/she has joined the relevant group. There is no cost to you to send this joining confirmation message.

There are no costs to your group members to receive your messages. SMS messages that you send to these group members cost you the same as other SMS messages sent from your BulkSMS account.

This service only works on South African and United Kingdom networks. Opt-in Group members, as with all recipients of your messages in South Africa and the and United Kingdom, can at any time remove themselves from your address book by replying STOP to any message that you may send to them. This SMS will be charged at the standard SMS rate.

## **6.8. Disable Advanced Features**

To disable any of the Advanced features:

**Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.

**Step 2:** Go to the 'Advanced Features' section and Click 'Other features'.

**Step 3:** Untick the feature that you would like to disable (i.e Purge failed numbers, scheduling, allow for Mobile2Group sending, transfer credits and/or Auto Response)

**Step 4:** Click 'Update' to disable the relevant feature.

**Step 5:** Click 'My Account' at the top of the page to return to the main menu.

## 7. *Edit your account*

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### 7.1. *Change password*

To change your password, you need to

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click on 'Update your profile' under 'User profile'.
- Step 3:** Change your password as required. Re -enter your password to confirm the change.
- Step 4:** Click 'Update' to complete your password change.

### 7.2. *Update details*

This option allows you to see your current profile and to edit it. To go to this page:

- Step 1:** Log in to your BulkSMS account. This will take you to your 'My Accounts' page.
- Step 2:** Click 'Update Your Profile' under 'User Profile'
- Step 3:** Enter the changes you wish to make. Note that you may not make changes to the User ID. Should you wish to make changes to the Daily Quota, email [support@bulksms.com](mailto:support@bulksms.com).
- Step 4:** Click 'Update' to update your profile

## 8. *Contact us*

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- Step 1:** Select 'Contact us' on the top navigation bar.
- Step 2:** Choose 'Contact Sales' or 'Contact Support' depending on your query.
- Step 3:** Enter your query. Please be sure to send your BulkSMS username for ease of reference.
- Step 4:** Click 'Send'.

You can also send an email directly to [support@bulksms.com](mailto:support@bulksms.com) or [sales@bulksms.com](mailto:sales@bulksms.com). Please be sure to include your contact details as well as your BulkSMS username in all communications.