

CAMPAIGN*

USER GUIDE
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GETTING STARTED

REGISTERING YOUR ACCOUNT

Here at Psycho Marketing HQ we try and make our system as clear and as easy to use as possible, and those clever bods who do all the nifty technical gubbins have made Campaign 2 as user-friendly as they can, so it's a doddle to start boosting your marketing profile.

However, not everyone is Albert Einstein (or Carol Vorderman) so if you're having difficulties you can use this simple "how to" guide to get yourself up and running. Ok, let's start right at the beginning.

N.B. anything highlighted in RED in this user guide is a clickable link or button.

Registering with Campaign 2 is simple, but here's a swift guide to help you through the process:

1. Ok so you've got to the main page at Campaign 2 with Psycho Marketing and you need to register an account. There are two handy links on the front page to click, and either one gets you started. These are located on the left (it's the big red button that says "**No Account? Sign Up!**") and on the top right in the menu (it's small and red like a baby tomato).
2. Click either of these and you're off to the registering page. Fill in all the details, tick the box about the terms and conditions (after you've read them, of course) and answer the daft question (this stops internet robots from getting up to no good) and click **REGISTER!**
3. Why do we need all those details? The internet is full of nasty people who like to sign up for services and then take advantage of our good natures, so giving all those details lets us know that you're a genuine user and supplies us with information in case we need to contact you. Don't worry, we don't hand out your information to anyone else and your number doesn't get used to receive marketing SMS messages from other users.
4. Did you read the terms and conditions? Yep? Good. There's a lot to take in there, but it's all handy information and some of the questions you might have could already be answered there.
5. Well done! You're all registered up. You're one step closer to sending.

THE DASHBOARD

The first thing you should see when you log in to Campaign is the Dashboard. The Dashboard is always accessible by clicking **HOME** or **DASHBOARD** in the menu and it's the best place to source information about your account.

GET MORE CONTROL

Download and install the Campaign Desktop Client to perform large list uploads, and create mail merge messages using your customer data - personalise your clients' experience! (PC only)

The Desktop Client also provides access to our unique Number Cleaning functions - which will attempt to identify bad numbers in your list and remove them as it uploads.

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PSYCHOMARKETING RECOMMEND YOU UPDATE YOUR BROWSER TO THE LATEST VERSION AVAILABLE

Figure 1: The Campaign Dashboard

At the top of the page you will see a reminder of your remaining credits, together with a drop down menu of Reports. These reports will provide you with all the necessary statistics you could ever need regarding your account. There's too many of them to list here, so we recommend jumping in feet first and pulling a few of these up! Directly below this you can see a graph that will show the volumes of Sends that you have done over the past week, keeping you fully informed about your recent activity. Finally, right at the bottom, we have the Quick Send SMS box: we'll cover this in the next section.

Over on the right you'll see a NEWS column: keep your eye on this section as there's always new features being added to Campaign and sometimes they require you to update the Desktop Client. Ensuring you have the most up-to-date version of the Desktop Client will give you the best results! On the left you'll see another column: here you will see information about your most recent paid or unpaid invoices: keep an eye on this if you are invoiced by Psycho Marketing at any time.

GETTING YOUR ACCOUNT READY

Ok, so you've registered an account and want to get sending? My, aren't you eager? Before you can send your messages there're a couple of things you need to do first:

1. Great, now for some house-keeping. Let's set up your originator, which you can do by clicking **ACCOUNT** in the top right menu (let's just call this the menu from now on, we're all friends here). The originator is a name or number that the message receiver sees, like when you get a message from your mum and you've saved her number as "MUM". So if you want your customers to see that your

message is from (for example) "AWESOME LTD." then put that there. Or you could put a phone number, so your customers could reply to you directly. Please note that originators are only available for Premium accounts (and since you've just signed up, your account is currently on that route already).

2. You'll notice a column on the right hand side of the account page explaining this, but it also mentions our standard incoming route, so if you put "AWESOME LTD." as your originator, then include this in your message (or another number you might have).
3. Why have a reply number? Well, not everyone wants to receive SMS marketing messages so this gives them a route to send a STOP message. How they do this is by texting STOP along with a Stop Code. You can see your stop code just above the originator box (it's the 4 digit number). You can change this stop code whenever you like.
4. You can also set whether or not you want to send a confirmation text of a STOP to a customer, as well as whether you'd like to receive notifications and reports by email. We'd recommend receiving these, so you've got a record of all your comings and goings. It's your call on the confirmation text though.
5. All done? Great. Now you need to buy some credits. This bit's easy. Just click **CREDITS** in the menu and you'll be directed to the BUY CREDITS page. Simply type in the number of credits you want and click BUY NOW. Don't you be putting any commas in the number as it'll only register the digits before the comma. So, let's say you wanted 10,000 credits: just type in 10000 and hit the button. You'll be directed to PayPal to complete your purchase. You'll notice that the price is £324.00 (so each message costs 3.24p): this is the cost of our standard rate (at 2.7p per message) along with VAT.
6. Using PayPal makes things super quick. PayPal payments go through straight away so your credits can be added to your account instantly. PayPal has an option of using a debit or credit card without a PayPal account, but this takes time as your credits won't added to your account until the payment clears. You might also notice references to Mobile Media Production on PayPal: fear not, that's still us.
7. Once you've gone through the PayPal process (I'm sure you know what you're doing there, if not, consult *their* FAQs), click the HOME button in the menu and you'll go to the DASHBOARD. Assuming everything went through fine, you'll see that you have credits available. Hurray!
8. By now you'll have seen numerous mentions of our 1p per message for bulk users offer. The best way to get this is to contact us at sales@psychomarketing.co.uk and we'll see what we can do.

SENDING MESSAGES

UPLOAD SOME NUMBERS AND SEND YOUR FIRST MESSAGE

You're all set up and made sure you on the starting blocks, ready to start sending to your customers. Sending mass SMS messages to a list of numbers is the simplest way to get your marketing out there; let's send some messages.

1. Click **SEND** in the menu and you'll arrive at the send page. The first thing that you'll see is three big old buttons offering **LIST SEND**, **QUICK SMS** and **SCHEDULE** options. Click **LIST SEND**.
2. This is the page where you can send loads of SMS messages to a list of numbers. But we haven't got any number lists set up yet! So let's do that: click LIST UPLOAD in the menu.
3. Once at the LIST UPLOAD page you can create a new list of numbers and give it a unique name, e.g. "Customer List 1". In the box marked "Enter Mobile Numbers", just add the numbers only, one per line. If you want to add personal names, then that's a bit more complicated and we'll come to that in another user guide.
4. Go back to the LIST SEND page (in the menu) and you should see that you've now got a number list available to send to! It's all going well so far. Select "Customer List 1" from the drop down menu and write a message. You can add your message to a message list if you think you'll be sending it again in the future too and recall it from the drop down menu at the bottom.
5. Ok, now for the complicated part: click the big blue **SEND** button.
6. A new window opens up to let you confirm the send: simply tick the box that says you've read the terms and conditions (which you've already done) and hit **SEND** (or **CANCEL** if you've changed your mind) and that's it; your messages have been sent!
7. That was pretty simple, but there's another method with which you can send your messages to your number lists. The 1-Click SMS route is for users who are getting to grips with the system and need to get their messages out quicker.
8. Click **1-CLICK SMS** in the menu and you'll head to the 1-Click page. Simply type your message in the box and select a number list. Click **SAVE** and your message will appear in the table above. Now click the blue **SEND** button on the right of your saved message and, zing bang, your message has been sent. Unlike the LIST SEND there's no confirmation window, so once you click **SEND**, that's it. All done. But beware! Don't click this button more than once as you'll find your message going out multiple times, using up your credits.
9. So there you go: two nice and simple methods for sending messages to your number lists. But that's not all: Campaign 2 is more than a simple SMS sending machine; it can do much more, all of which is tackled in further user guides.

QUICK SMS

Ok, you've got to grips with LIST SEND and 1-CLICK SMS, but what about if you want to send just a few messages to a smaller number of customers, perhaps even ones that aren't in your number list? You can cut out the LIST UPLOAD function and get your messages sent faster using Quick SMS. Or perhaps you want to send a message at a future time: well, we can do that too! Let's look at Quick SMS first:

Click **QUICK SMS** in the menu. You'll notice that this takes you to the bottom of the Dashboard, so if you're already there, just scroll down! Add your numbers, only per line, in the Numbers box and type your message in the box next to it and click the big blue **SEND** button. Much like a LIST SEND you'll see a new window asking you to confirm the send: tick the box and click **CONFIRM AND SEND**. Success! Your message has been sent.

SCHEDULED SMS

Using the Scheduled SMS function is equally easy! Click the big blue **SCHEDULE** button on the Send page, or select it from the menu. Similar to other message sends, select a number list and add your message. Click **SCHEDULE** in the centre of the page. This will bring up a calendar window. Here you can select the date and time that you want the message to be sent at. You can even set the message to repeat at selected intervals. Clever, huh? Tick the box and click **ACTIVATE SCHEDULE**. Your message will be sent on the scheduled date, at the scheduled time!

You can use this page to see if your scheduled sends have been sent, and what scheduled sends you have pending. Make sure you have enough credits in your account for when the send is due to go, or they won't get sent.

TRACKING YOUR SENDS AND MESSAGES

Once your messages have been sent, you check its details in **MY SENDS**, available in the menu. Here you can make sure your message sent, check for any click tracking (that's for the high-tech bods to worry about) or get information about the send.

Moreover, you can manage your saved messages (edit them, delete them or add another), simply click **MESSAGES** in the menu.

LIST TOOLS

Another really handy feature of Campaign is the List Tools. This function allows you to manage Lists that you've previously uploaded to Campaign. Click **TOOLS** on the Send page and you'll be taken to the List Tools. On the left hand side, you'll be able to see all your lists, sorted alphabetically. On the right, you will see a graph showing the status of the topmost List. Let's go through the functions (the little icons under the box of lists):



First up we have **Load Stats** (it looks like a little magnifying glass), clicking this will bring up the graph again for any list you highlight. You can even select multiple lists (hold CTRL when you click them) and the graph will combine the data!



Next up: **Delete List**. This looks like a red button with a white cross on it. Clicking this will delete your highlighted list. Luckily a box will come up asking you to confirm the action, so you've still got a chance to change your mind.



The next one along is **Merge Lists** (like a page with a red and blue arrow on it). When you highlight more than one list and click this button, Campaign will combine the lists into one new list. You can give your new list a unique name and it will be stored as a list in the box on the left.



Then we come to **Rename List** (two pages with a green arrow between them). This should be pretty simple: a box will pop up allowing you to add a new name for your list. Click OK and your new list name will be saved.



Next, we come to **Remove Stops** (white hand in a red octagon). This function will allow you to remove any numbers that have replied STOP in the past from one of your Sends. The benefit of this is that when you perform another Send using the same batch of numbers, the stopped numbers will already be removed, so the Campaign system doesn't have to check your list and everything goes much faster! We recommend performing this function regularly on all your lists.

Finally, you might have what are called "Orphaned Numbers". This is what happens when you have numbers in the system that aren't actually in any of your lists. There are several reasons why this can happen, and none of them are important right now. Anyway, if you click **MAKE LIST FROM ORPHANS**, you can create a new list that is filled with all the orphaned numbers in your account.

RECEIVING MESSAGES

Along with high performance SMS sending, Campaign also has the power to receive messages for you! This can be accessed by clicking RECEIVE on the menu. Here you have four choices: INBOX, ROUTES, PREMIUM SMS and STOPS (all available by the menu).

INBOX

In order to take advantage of these functions you will need to arrange access to an inbox with Psycho Marketing. Email us at support@psychomarketing.co.uk to set this up. We'll arrange a reply longnumber/shortcode for you to set as your Originator (or to put in your messages) and all replies that go to that number will go to your inbox.

Once we've set up the reply longnumber/shortcode and inbox for you, click INBOX. You'll now see the INBOX page: in the middle box you'll see a drop down menu and some big blue buttons. Choose your inbox from the drop down and click the INBOX button. You should now be able to see all the replies you've received. Replies that contain the word STOP are automatically filtered from your inbox, but you can view these too, by unchecking the "don't show STOP messages" box. These are automatically stopped for you, but you can stop other numbers (such as ones with naughty words in) using the actions on the right hand side of the inbox section. You can also export your inbox as a spreadsheet using the big blue GET REPORT button.

ROUTES

As well as the inbox, there are other methods with which you can receive your messages. Regardless of whether it's a longnumber or a shortcode (you can see the pricing for these on the left hand column), you can add "triggers" to your messages (e.g. Reply TXT OFFER to 12345) which can route the replies to different places, such as your email, an API (which is a bit of code on your website that listens for incoming information) or to our reply route, which automatically sends a second message (costing you one credit), usually providing further information about your product. To set this up, type your trigger into the box marked TRIGGER and add the email, API or the message you wish to reply with and click ADD NEW. This saves the route and ensures that all messages with that trigger go where you want them!

PREMIUM SMS

This route allows you to add a sub-trigger to a pre-existing trigger and shortcode, each costing your customers a small amount to reply to. For example, if the short code of 12345 has a trigger of CAMPAIGN at 10p, you can add the sub-trigger of INFO, adding "reply CAMPAIGN INFO to 12345" to your messages. You will then receive a revenue share of all the messages received with that sub-trigger, earning you money! But beware! There are legal implications behind using Premium reply routes, so please contact us at support@psychomarketing.co.uk for advice before using the service.

STOPS

Ok, let's take a minute to talk about STOPS. You always need to offer your customers the option to stop any further messages from your service in your message. An example of this would be "Reply STOP INFO". Campaign uses high tech jiggery-pokery to identify STOP requests when they come in, but like all stupid computers, it can only do this when the correct information has been received to the correct route.

Firstly Campaign will identify the STOP as being a request to stop receiving messages; secondly it identifies for which account it wishes to apply the stop. On your account you have a unique stop code identifier, defaulted as a four digit number; you can change this to a word (the shorter the better, but over 2 letters please) within the account page, accessible from the menu.

For example, if your stop code is INFO, then any messages received with the text STOP INFO will be stopped on your account. Remember that customers receiving texts they don't want only leads to unhappy, even angry customers, so it's in your interest to make sure that the stop process for your messages is clear.

If your message is sent out with a word as the Originator, e.g. FASTLOANS, then you'll need to add a number for your customers to reply to; we can provide you with a longnumber to add to your message (check our pricing page). We also have a new function called Stop URL. By adding a unique URL (available from your account page) to your message, your customers can now go to a website and input their number there to stop further messages!

So, back to the website! You can now stop messages manually on the STOPS menu. Click STOPS and you'll be taken to the STOP MANAGER. You can add numbers to the box and choose what type of stop you require: Stop Until and Permanent. Then just click STOP THESE NUMBERS and you're done!

THE DESKTOP CLIENT

To get more out of Campaign 2 you can use the Desktop Client, instead of the internet site (that's the one you've been using up to now, if you've been following this guide). First you'll need to install the client. NOTE: the Campaign Desktop Client will only work on PC at the moment; there hasn't been much of a call for a Mac version, but if demand is great enough then we'll get our brainy types to look into it:



1. Click **LIST UPLOAD** in the menu on the internet site. This will take you to the List Uploader and you should see an advert for the Campaign Desktop Client on the right hand side. Just click on the snazzy picture of the box or the link provided, or click this link here:

<http://apps.psychomarketing.com/desktopclient>

2. This should take you to the Install page, where you'll have a couple of options. First you've got the **LAUNCH** link, which you can do if you've got all the required elements already installed (if you're on Windows 7, they probably are). If you're not sure, then click the **INSTALL** button instead and this will add the stuff you'll need anyway. This will download a file called setup.exe; once it's downloaded double-click it to run the installer (Windows will probably give you some warning boxes, but don't worry, we haven't got any nasty viruses in our software, so just click **RUN** or **INSTALL** whenever they come up).
3. The Campaign Desktop Client should now open automatically.
4. The username and password are the same ones you use for the web-based version of Campaign. You'll see that all the essential services are located on the right hand side of the screen. From top to bottom you can see: your username, your stopcode, reply routes (we'll get to that in a moment), originator, your remaining credits and your send group (this tells us what method we use to send your messages for you – the default is CAMPAIGN).
5. The Campaign Desktop Client has two main uses: List Uploading and Mail Merge. List Uploading is similar to that in the web-based version, but with some added extra bells and whistles and Mail Merge allows you to apply the extra bells and whistles to a message.
6. It's all very exciting.

LIST UPLOAD

You may have found that uploading a large list through the website can be problematic, and for large lists we recommend that you use the List Uploader function in the Desktop Client. Here's how...

1. In the desktop client, click Tools in the top left toolbar and select List Uploader . This brings up the list uploader box! This box allows you to upload the list from a Text document, much in the same way that you can in the web-based version of Campaign.
2. Click Open File and select the .txt file with your numbers. If you have your numbers saved as a different type of file, you'll need to re-save it as a .TXT file. If it's a spreadsheet (e.g. a .XLSX or similar) you'll need to add an extra line at the top as the list uploader expects to see a header. If you

change your mind you can always click Clear Upload Queue. Ok, give your list a name (or add it to an existing list – a drop down menu appears when you tick that box) and click Upload Number List.

3. Hey Presto, your list is uploaded!

MAIL MERGE

The other nifty thing that happens on the desktop client is the Mail Merge. Basically this allows you to add unique information into each message you send. The most common type is the name of the message recipient (e.g. “Hi Jim, we’ve got a wicked new product that you’ll be interested in!”), giving your messages the personal touch. Let’s pretend that’s what we’re going to add to our messages and get cracking.

1. Ok, the first thing you’re going to need is a big old list of numbers, with names attached to each number. More than likely, you’ll have a spreadsheet of this information, but if not you’ll need to make one. In the first column, you’ll have the numbers and in the second column, the names. Now, pay attention, because this bit’s important: you’ll need to save the file as a .CVS or a .TXT file.
2. Right, once you’ve got your file, you need to send it. In the desktop client, click Tools, then Mail Merge, bringing up the Mail Merge box. The first thing to do will be to write the message. Mail Merge automatically assigns a number to each variable in your list, starting from 0, so the numbers are assigned as 0 and the names are assigned as 1. This way you can add the name to your message as follows: “Hi [1], we’ve got a wicked new product you’ll be interested in!” Mail Merge will replace the [1] with the name of the recipient making the message read: “Hi Jim, we’ve got a wicked new product that you’ll be interested in!”
3. If you don’t have all the names to go with the numbers you can add a default value in the Merge Parameters. For example, if you put “there” into the [1] parameter and you don’t have the name of the customer, your message will read: “Hi there, we’ve got a wicked new product that you’ll be interested in!” and thus your message makes sense. Tick the boxes of the ones you’re using (in this case, just [1] is fine).
4. You can add other information, such as a location (“Hi Jim, we have a big sale on in the London area!”); a website (“Hi Jim, like fast cars? Go to www.fastcars.com!”); or anything you please! And the best thing is that you can add up to 3 different variables in your message.
5. Ok, once you’ve made your message you’ll need to upload the .CVS or .TXT file you made earlier. Click Load Mergefile and choose the file you created.
6. Once you’ve done that, you can choose to tick any of the other boxes in the top part of the Mail Merge box, which will aid your send. *Ignore Extra Data Items* cuts your message down if it’s too long, preventing a two-message send; *Ignore Truncation Errors* (always tick this one); *Automatically Default Truncation Errors* (tick this one too); *Drop Suspected Bad Numbers* (click info); and finally *Drop Numbers From List* (click info).
7. Finally click Send Merge and confirm. Your unique messages will be sent!