SMS MARKETING KEYWORDS

July 2023

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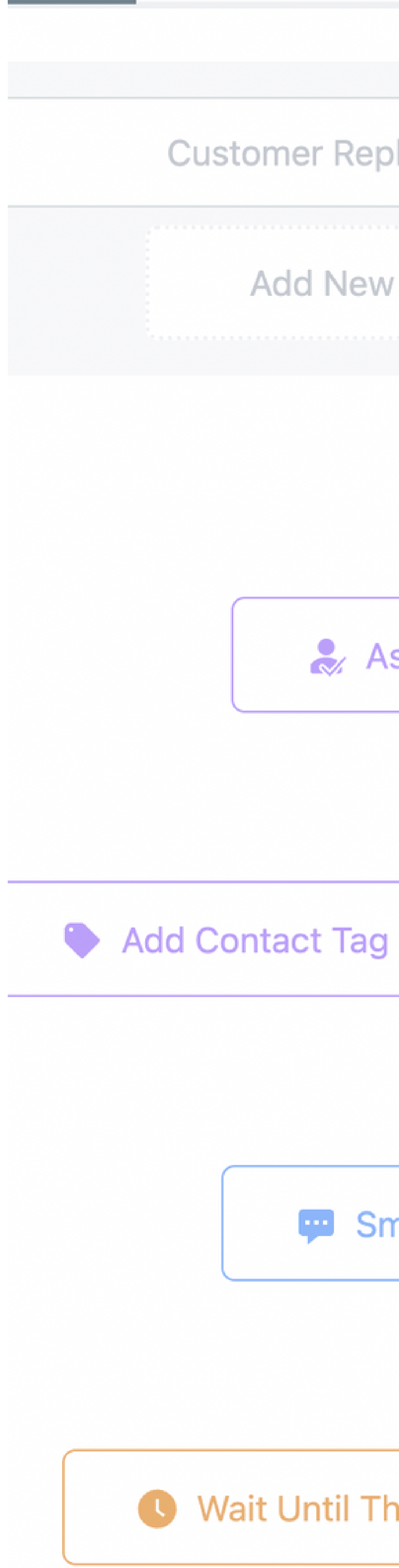
INTRODUCTION

This guide will specifically walk through how to set up all the pieces you need for a smooth process. Any workflow you create will have several settings & configurations you are able to customize. As well as details logs to help you track your steps & troubleshoot.

Actions	Add the actions you would want an employee or other system to perform…even add comments, copy, move, or delete steps
Settings	Configure your flow settings including sending time, subject, from address, and more
History	View every step executed in chronological order for all contacts
Status	View each contact in your flow & what step they are currently on, next execution, etc
Trigger	A behavior or setting used to fire off a workflow
Actions	The automatic steps the software will perform when your workflow is fired off
Custom Field	A field that captures information about the contact individually
Custom Value	A predetermined field for your account that can be pulled into messaging such as an unsubscribe link
Allow Multiple	If turned on under settings, this will allow a single contact to go through the workflow more than once



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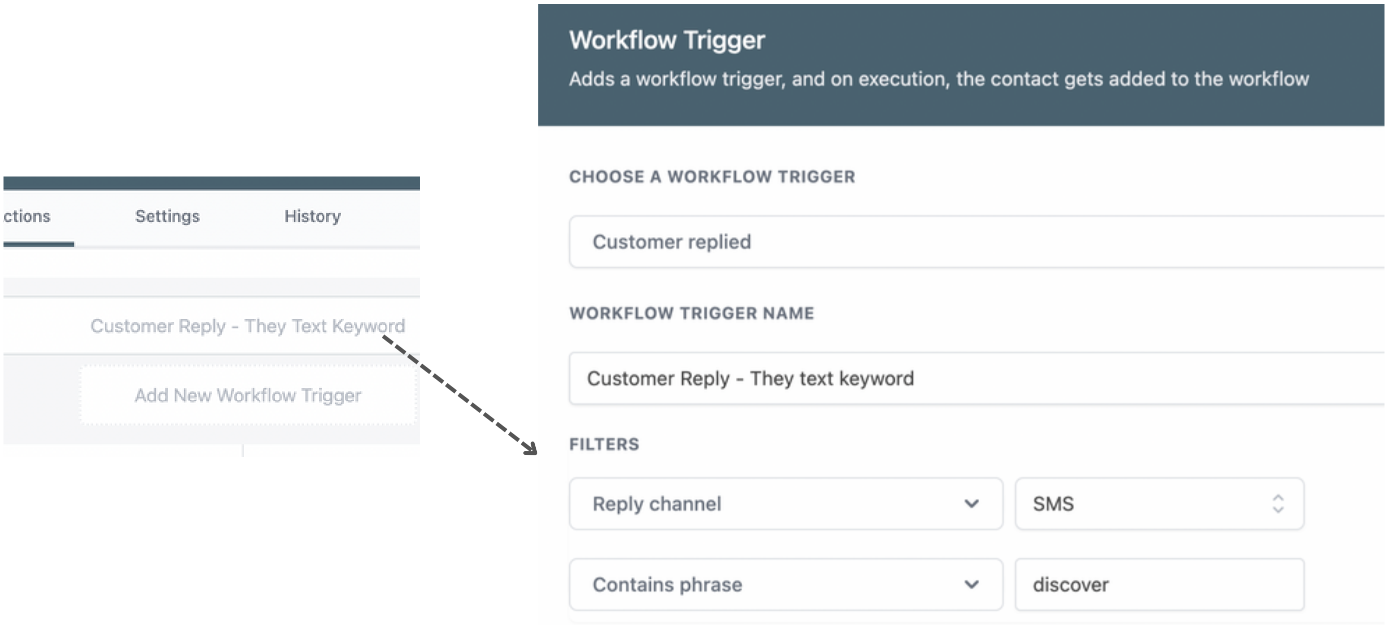
PART 1
CONFIGURE YOUR WORKFLOW TRIGGERS



1. Open Automation on the left tab – Click + Create Workflow

2. Open the Settings top tab to configure basic settings like sending window, from name & email address...
   - Allow multiple – enable or disable the ability for contact to go through this workflow more than once
   - Stop on response – enable or disable if the contact responds to a message then the workflow will stop for them

3. Under the Actions top tab, add your workflow trigger(s)
   - Trigger – Customer Replied
   - Filters – Replied channel (SMS), exact match phrase or contains phrase with the word you want to use

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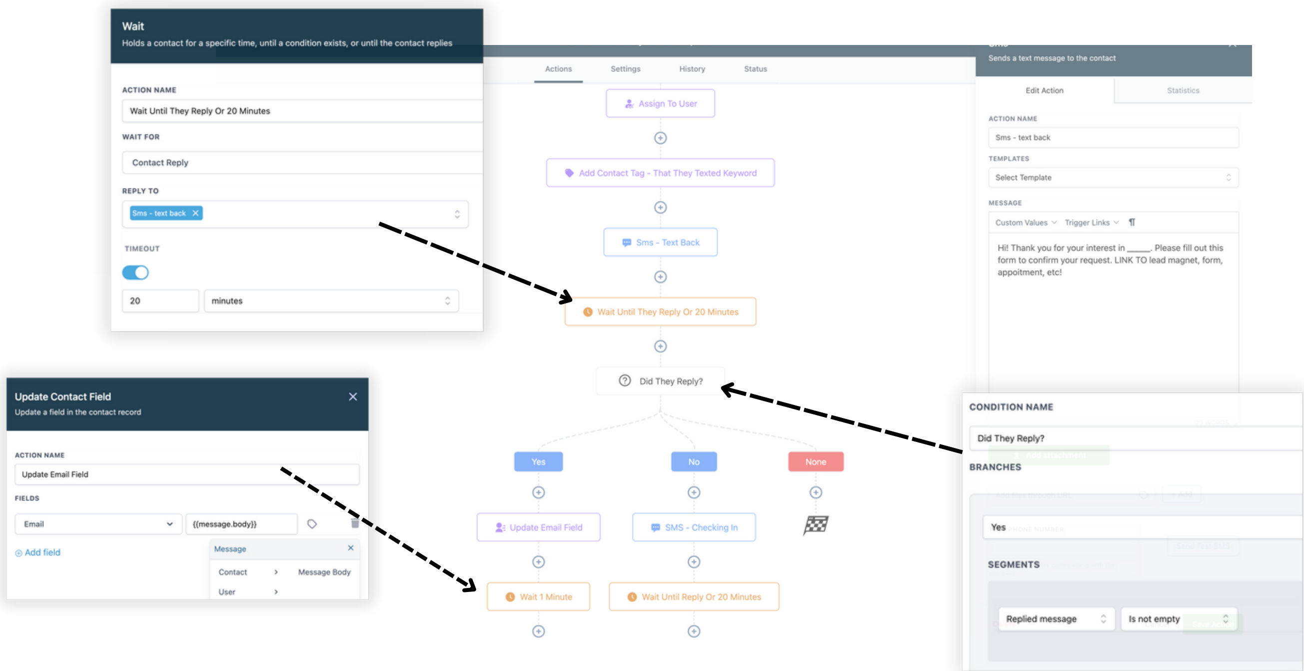
PART 2

CONFIGURE YOUR WORKFLOW ACTIONS



1. After configuring your triggers, start adding actions
   - For example... tag them, send confirmation & follow-up emails, SMS, or Voicemail, update or add them to a pipeline, send the user an internal notification, etc. & Use custom fields & values to customize messaging
2. Send SMS – Send a text back automatically
   - For example, a link to request a lead magnet, book an appointment, register for an event, or even ask them to just reply with their email
3. Use Wait Steps & If/Else steps to wait until they reply with their email
4. Use the contact field to update their email field with their replied message (this will only input the email address from the message) & send them an email with the info
5. Test & Publish Your Workflow To Make It Live

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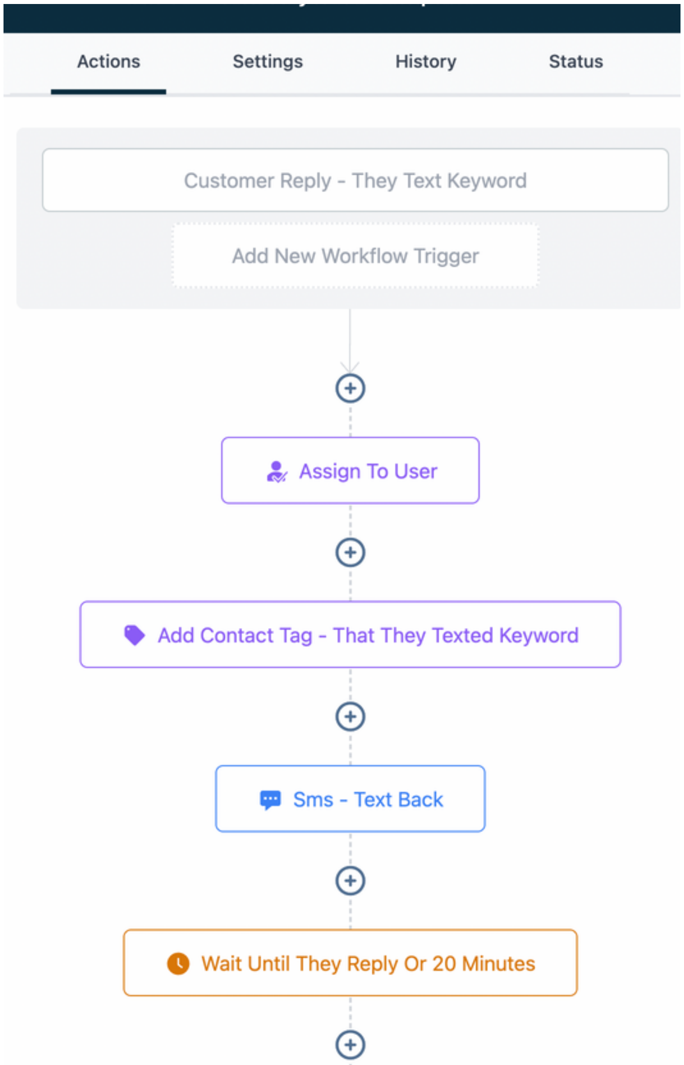
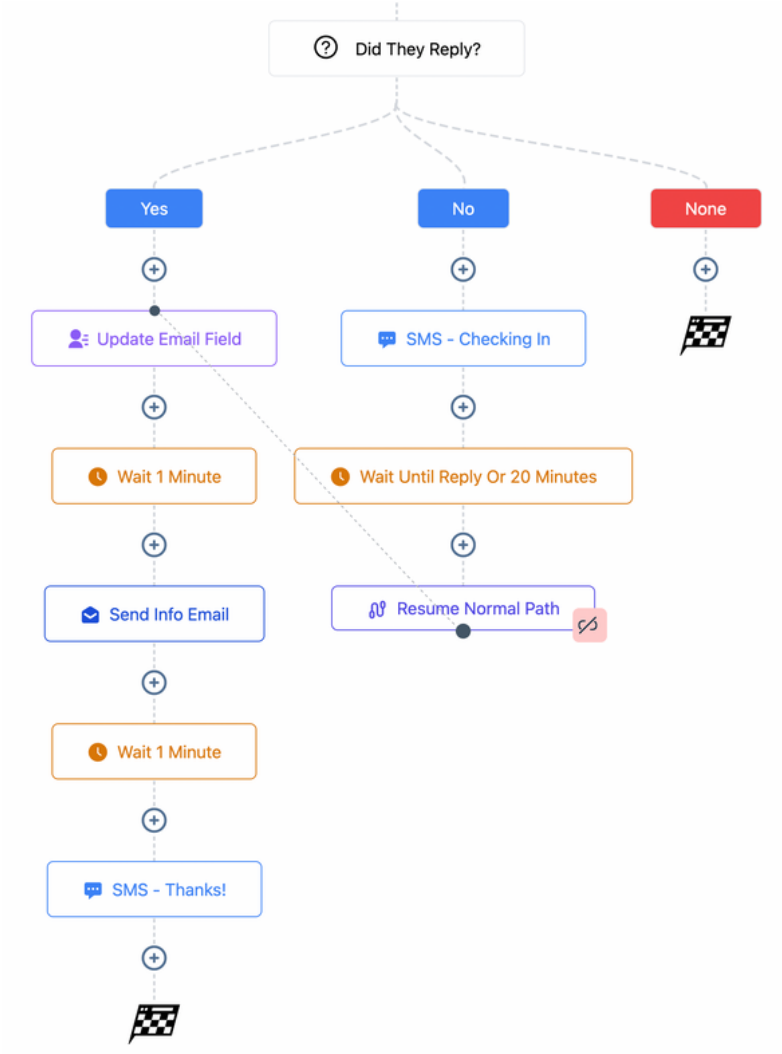
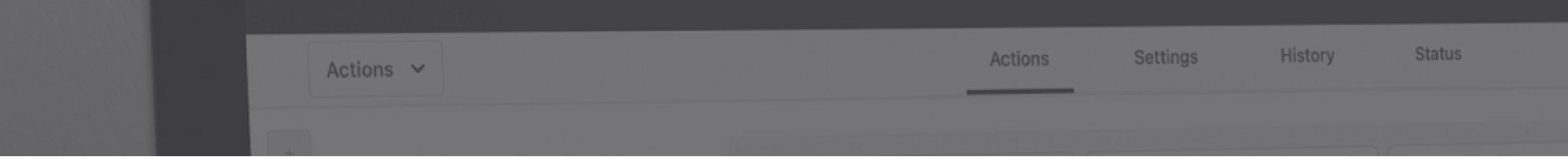
EXAMPLE WORKFLOW





- Here is an overview of what our normal workflow for a text keyword looks like so you can get a good big-picture idea but you can add or simplify it as you need



TROUBLESHOOTING TIPS

MASTERING AUTOMATION ONE STEP AT A TIME

Have You Tested It?

Run through your process as a client would with placeholder information to ensure your automation is set up how you want. Use the Status, History, & Execution log tabs to your advantage and their contact record data. You can permanently delete your contact and test again.

Have You Cleared Your Cache?

Sometimes when your browser, system, app, or other services push updates that clog up your browser cache. Clearing your cache only gets rid of the data your device has stored from the websites and apps you visit—it has no impact on your photos or the files you have saved there.

Do Your Triggers Need Additional Filters?

See what filters you can add to your workflow triggers to give more context to what your requirements are for this to fire. Just telling it to fire off of ”Form Submitted” doesn’t tell you WHAT form you are talking about....unless you add the ”form is” filter.

Have You Sent A Loom Video To Support?

Make sure to use loom.com as a resource when communicating with the support team, they give us an immense amount of context as to what your issue is so we can get you a solution quicker.

Is Allow Multiple On?

The allow multiple toggle under workflow settings determines whether a single contact can enter your workflow more than once. Think about if this would fit your project & if you need it on temporarily for testing.

Have You Looked Through Workflow Logs?

After adding or testing a workflow you can view every step executed in chronological order for all contacts within the History tab. Under the Status tab of a workflow, you can view each contact in your flow & what step they are currently on, next execution, etc. These are so helpful when troubleshooting.

Have You Checked Your Audit Logs?

When viewing your account settings, you can scroll down on the left side menu to view various logs and changes made to contacts, custom fields, values, and so much more. This is so resourceful when looking at who, what, when, or where a change was made.

Have You Tried An Incognito Tab or Other Browser?

Sometimes when there are updates or your cache is blocking the system from functioning correctly, you may want to try testing in an incognito private browser where your cache doesn’t carry over or in a new browser like Safari.

NEED MORE HELP?

CHECKOUT OUR SUPPORT OPTIONS & RESOURCES

Our team is fully dedicated to supporting you every step of the way, ensuring your success. You can review the wide range of resources and support options available to guide you through any challenges or inquiries. Don't hesitate to reach out to our team whenever you need additional assistance; we're always here to help!

WWW.YOURHELPWEBSITE.COM

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