SMS MARKETING

KEYWORDS

December 2023

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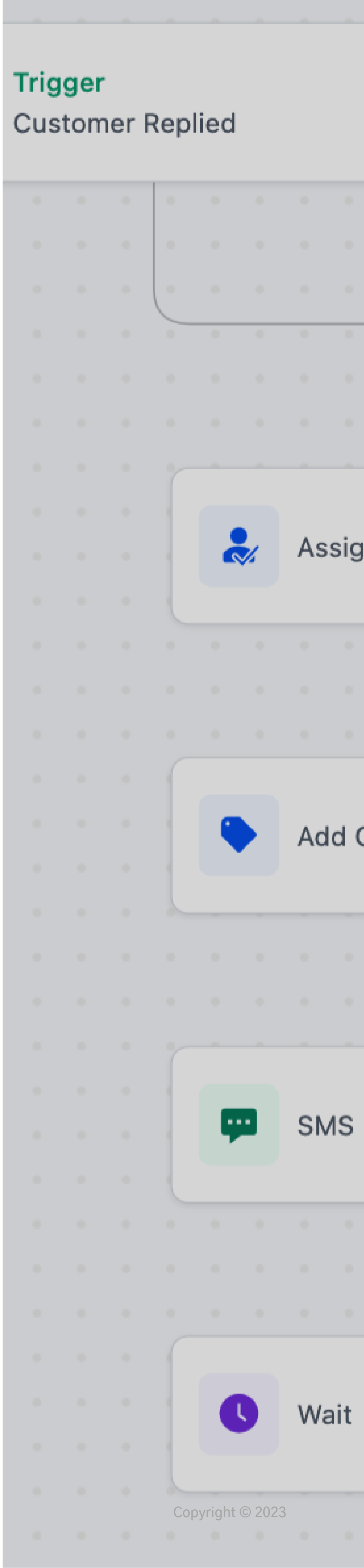
INTRODUCTION

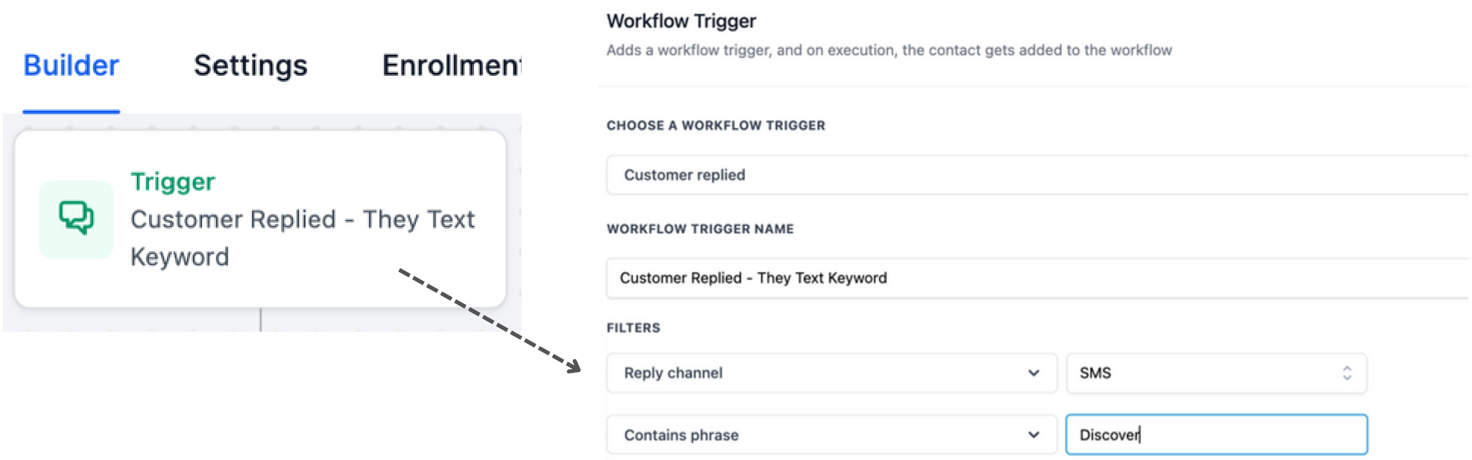
This guide will specifically walk through how to set up all the pieces you need for a smooth process. Any workflow you create will have several settings & configurations you are able to customize. As well as details logs to help you track your steps & troubleshoot.

Builder	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
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



02

PART 1
CONFIGURE YOUR WORKFLOW TRIGGERS



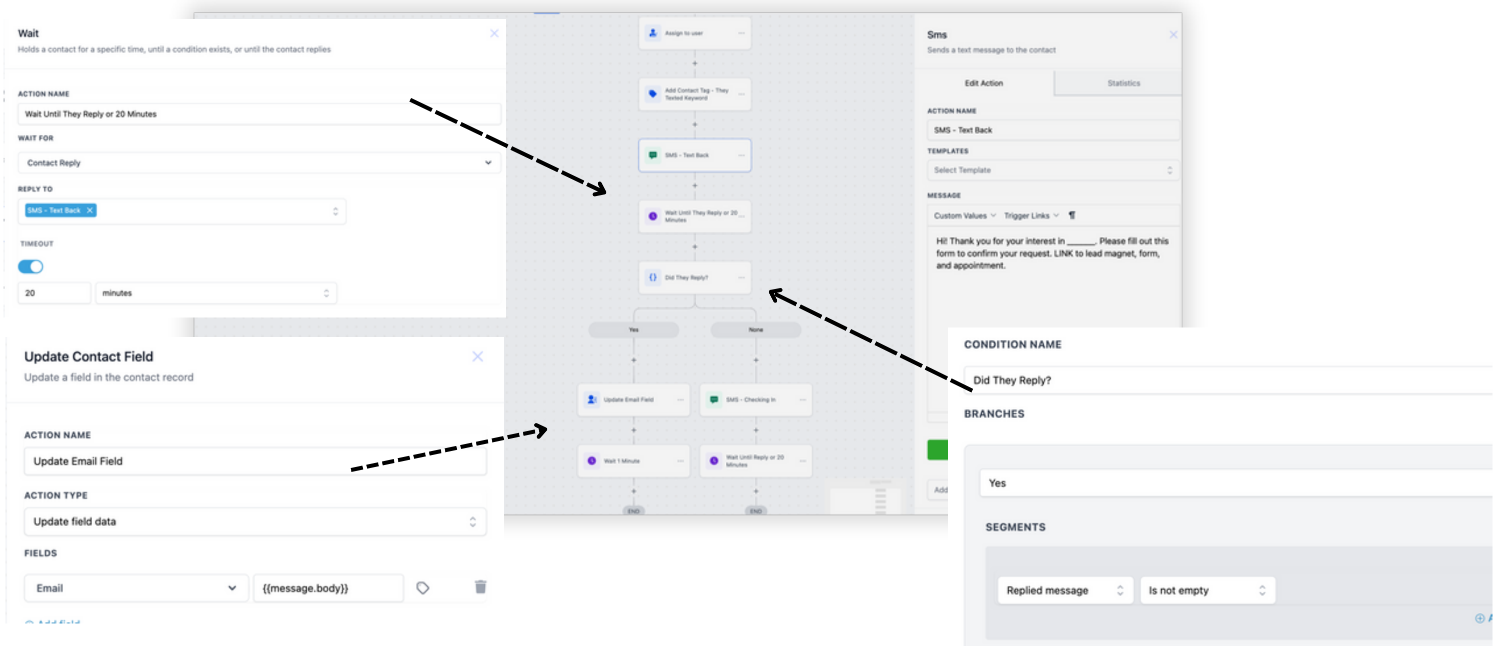
1. **Open Automation on the left tab – Click + Create Workflow**

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

02

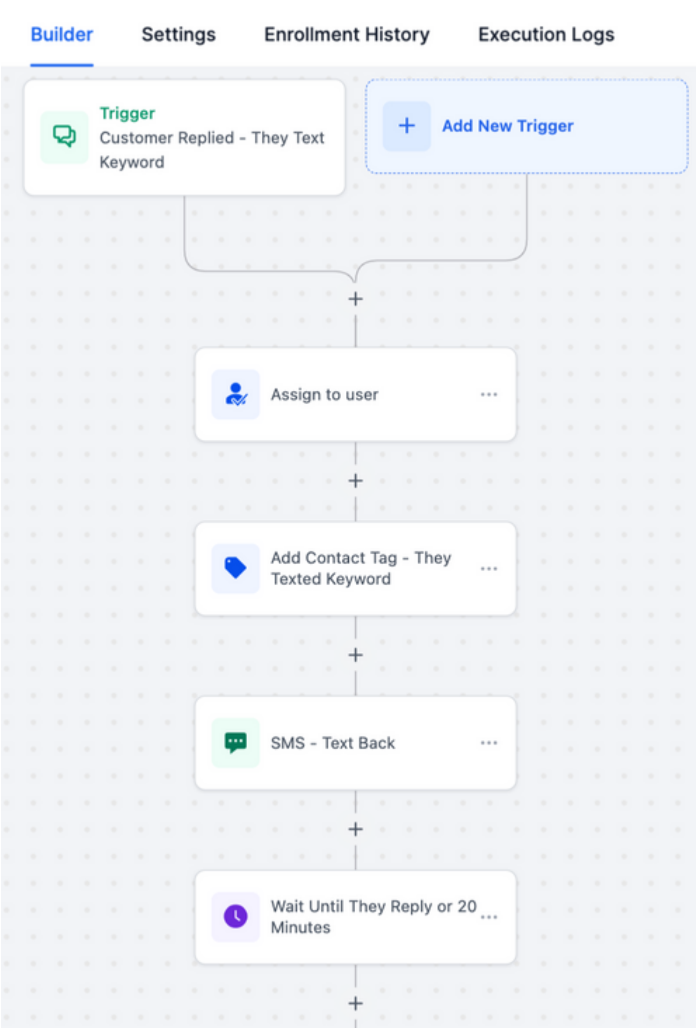
PART 2
CONFIGURE YOUR WORKFLOW ACTIONS

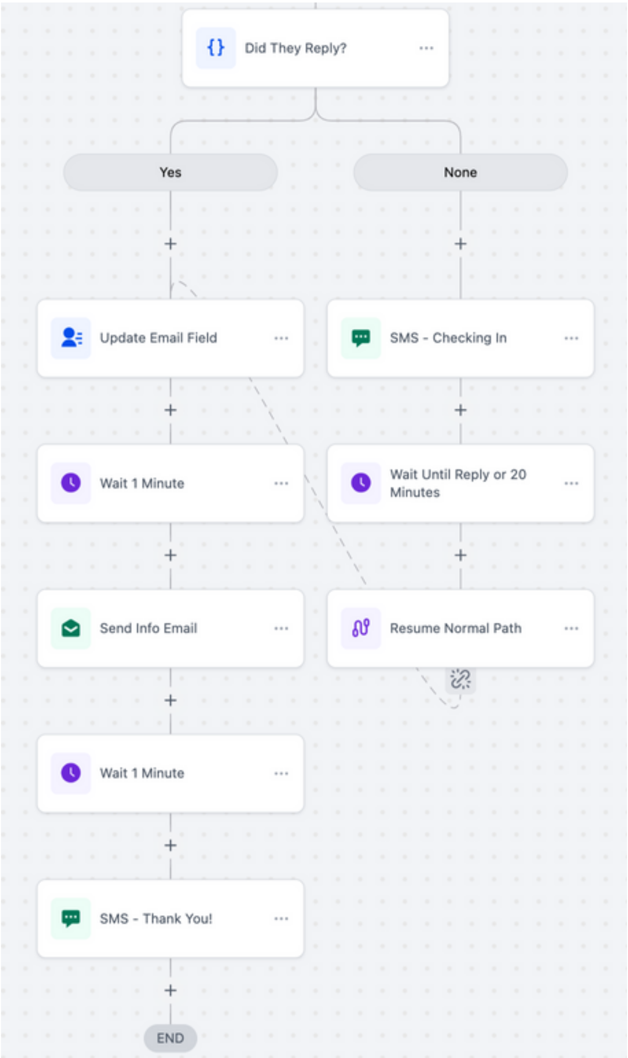


1. After configuring your triggers, start adding actions
   - For example... tag them, send confirmation & follow-up emails, SMS, or Voicemail, update or add them to a pipeline, send the user an internal notification, etc. & Use custom fields & values to customize messaging
2. Send SMS - Send a text 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

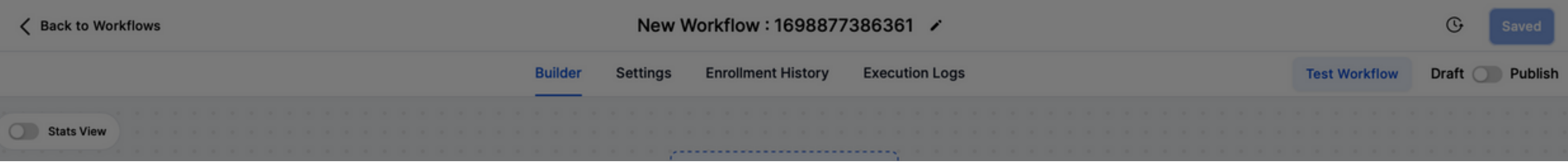
03

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 WORKFLOWS ONE STEP AT A TIME

Have You Tested It?

To ensure your automation is configured to your liking, go through your process as a client would, using placeholder information. The log tabs, along with contact record data, can help you optimize your setup. Don't hesitate to permanently delete your contact and try again to get it just right.

Have You Cleared Your Cache?

Updates pushed by your browser, system, or other services can fill up your browser cache. Clearing your cache solely removes data stored on your device from the websites and apps you visit, with no influence on your photos or saved files. A simple search for instructions depending on your browser you use will give you the directions you need.

Do Your Triggers Need Additional Filters?

To give more clarity to your workflow triggers, incorporate suitable filters that outline your requirements for it to execute. Merely having it set to trigger off of "Form Submitted" is vague and doesn't provide any specifics about which form is being referred to. Incorporating the "form is" filter can help alleviate this issue.

Have You Sent A Loom Video To Support?

To expedite finding a solution, take advantage of loom.com as a communication tool when reaching out to the support team. The website provides us with valuable context about the issue, helping us help you more efficiently.

Is Allow Re-Entry On?

The "Allow Re-entry" toggle in your workflow settings is responsible for allowing a contact to enter your workflow multiple times. Consider if this feature is necessary for your project and if you only need it temporarily for testing purposes.

Have You Looked Through Workflow Logs?

If you're ever in need of troubleshooting a workflow, there are two tabs you can check out. Firstly, the Execution Logs tab will show you every step executed in chronological order for all contacts. Secondly, you can go to the Enrollment History tab to see each contact in your flow and which step they are currently on, as well as their next scheduled execution. These features are incredibly useful when it comes to tracking the execution of workflows.

Have You Checked Your Audit Logs?

When you access your account settings, take a look at the left side menu and scroll down to "Audit Logs" to view various logs and changes made to contacts, custom fields, values, and more. This feature is incredibly useful when you need to know who made a change, what was changed, and when it was changed.

Have You Tried An Incognito Tab or Other Browser?

If you're experiencing issues with updates or your cache interfering with the system's functionality, consider testing it out in an incognito private browser. This allows you to bypass the cache and start fresh. Another option is to use a different browser like Safari to see if the issue persists.

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!

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