



User Training for Merge



What can the Merge Messaging application be used for?

The Merge Messaging application provides you with an immediate, cost effective and simple way to communicate to your staff, suppliers and customers directly to their text capable mobile devices.

The application allow you to update or alert people with the added benefit that the message is received wherever the recipient is.

It also offers various interfaces to meet the needs of different users: API; Web or Outlook

It uses a simple messaging API for basic integration into your systems. Mobile message recipients can then reply from their phone straight back to the original sender using Conversational Threading technology.



Signing into the Merge Messaging application

<https://merge.shortcode.co.nz/ui/>



Logging in

- ▶ Speak to your Merge Account Manager to set up an account for you
- ▶ Sign in with your UserID and Password.
- ▶ Upon logging on, you will get the Welcome Screen at first-time access.

Welcome to the new-look merge!

We hope you enjoy our easier to use User Interface and clearer Menu System.

Apart from the new UI you should be aware of the removal of the ever-confusing 'Address Books'. Your old Address Books now appear as a Group instead, so you can easily send to all the Contacts within the Group.

If you import contacts, you now import into Groups not 'Address Books'.

Every Contact must have a Security Domain, but we recommend you try to just use the default 'Shared' one unless you are sure you need the complexity that Security Domains bring.

If you need to stop some Users from accessing certain Contacts or Groups you can create a 'Security Domain' for those Contacts, and then grant your Users appropriate access permissions.

Unfortunately when removing Address Books we had to create a matching 'Security Domain' for each one because you might have had legitimate security requirements in place, but if this is not the case we strongly recommend you go straight into the 'Security Domains' menu (under 'Contacts'), select those legacy 'Address Books', and use the 'Merge' command to Merge them with the 'Shared' Security Domain. It will tidy things up nicely and reduce confusion among Users.

It will take a while, but it's important to realise that Address Books and Security Domains are NOT the same thing.

- Security Domains are only for controlling access to Contacts.
- Groups are what you use to categorise Contacts.
- Address Books were a strange mix of both.

More information available in the [User Guide](#).

☐ Don't show this again

Close



Main Menu Navigation



BULLETIN

Landing Page


Merge
BY TELECOM




Merge Admin

COMPOSE

 Messages

- > Compose
- > **Inbox**
- > All Messages
- > Sent Messages
- > Scheduled Messages
- > Draft Messages
- > Templates
- > Keywords
- > Numbers

 Contacts

 My Settings

 Company Settings

 User Management

 Reports

Inbox

Report

Pause Refresh

Filter

☐	↓ Date/Time	From	Message
☐	15 Nov 22 12:43	64278074870	Reply from Spark handset

Display

10

 1 to 1





Merge Admin

COMPOSE

Messages

> Compose

> Inbox

> All Messages

> Sent Messages

> Scheduled Messages

> Draft Messages

> Templates

> Keywords

> Numbers

Contacts

My Settings

Company Settings

User Management

This screen also display the options the user chose for:

- Their Profile pic (optional)
- Status identifier (defaults to 'Available')
- Provide a status statement (optional)

The Profile picture can be selected via the Settings menu

Menu

Options:

▶ Compose

▶ Messages

▶ Contacts

▶ My Settings

▶ Company Settings

▶ User Management

▶ Reports

▶ Log Out



Compose

To 
Who should receive the message

Drag your CSV here or 

Local 0 | Other 0 | Contacts 0 | New Contacts 0

From ☐ Additionally forward any reply to 6449138149
What number should the message be sent from

Message
0 text messages used

Draft saved at 13:57:31

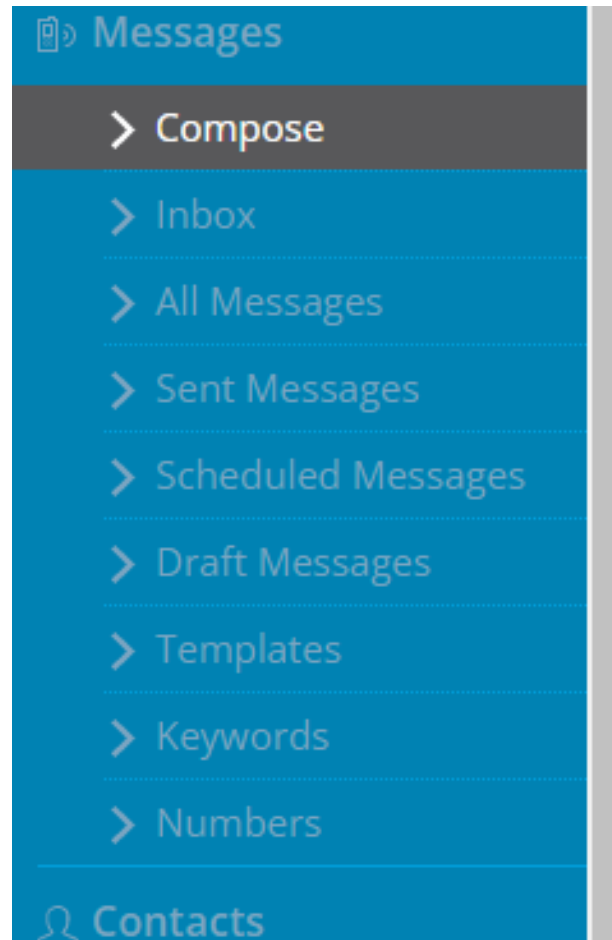
- ▶ Composing a message
- ▶ You will need to select a recipient/s
- ▶ Recipients can be selected by importing a csv file
- ▶ Additional reply to mobile option (via tickbox)
- ▶ The message box for messages in freeform text plus emojis (limits may apply)
- ▶ Optionally add a link or file as attachment
- ▶ The option to edit the signature
- ▶ The option to save the message as a template
- ▶ A send button to send the message for immediate delivery
- ▶ A schedule button, to specify a date/time to send the message



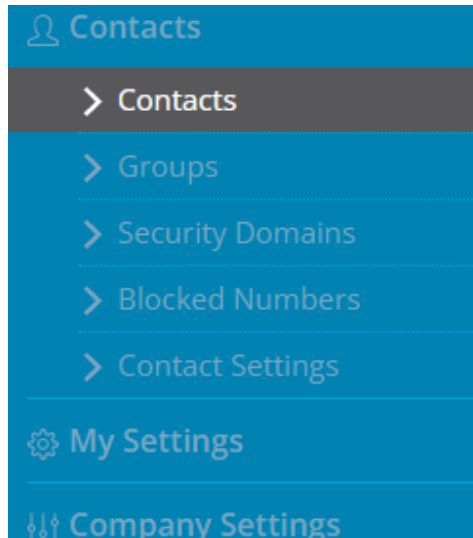
▶ Messages Menu

Essentially a store for your messages, templates and numbers

- ▶ Compose (creating a message)
- ▶ Inbox
- ▶ All Messages (incl Conversational threads)
- ▶ Sent Messages
- ▶ Scheduled Messages
- ▶ Draft Messages
- ▶ Templates
- ▶ Numbers (incl any short codes routed to your account and available for your use)



► Contacts Menu,
with options for:

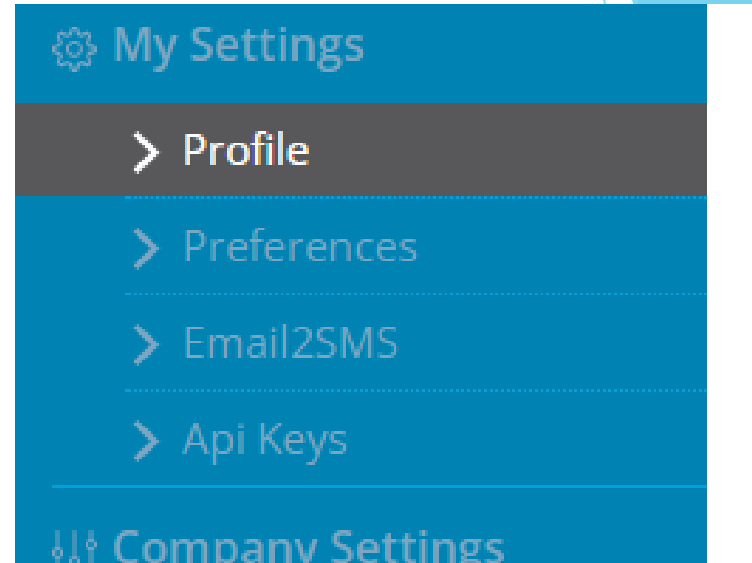


- **Contacts** - User contacts with contact numbers in International format. Able to create contacts from this option, also to search for individual or group
- **Groups** - Group contacts with contact names and numbers in International format. Able to create contacts from this option, also to search for individual or group
- **Security Domains** setup/changes
- **Blocked Numbers** - provides the facility for a Company Administrator to block selected numbers for all of their users quickly and conveniently. From here can also unblock, or export the list via CSV
- **Contacts Settings** setup/changes



▶ My Settings Menu

- ▶ **Profile** - Allows users to update their personal information
- ▶ **Preferences** - where a user can control some of their preferred behaviour, such as the 'Home' Page they see when they log in, how long they keep messages for and their notification preferences
- ▶ **API Keys** - where users can view their existing keys or create a new one



► Company Settings Menu

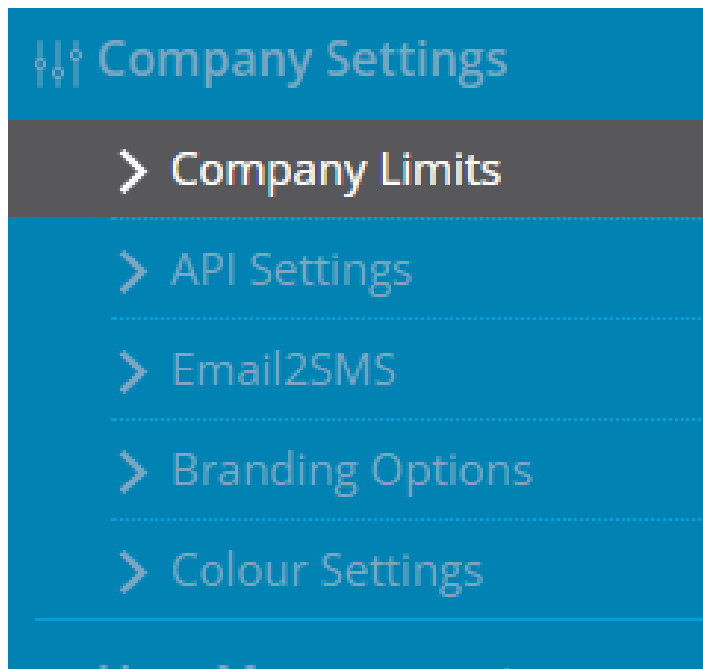
- Only available to Company Admins
- Change settings at a company level for:

- Company Limits, including

- Message limits per day or hour
- Message length
- Password policy
- Allow translation
- Prefer International Numbers
- Block inbound as well as outbound

- API Settings, including setting the format and specifying defaults for Callback URL

- Email2SMS, listing emails and providing the ability to create the Email2SMS security

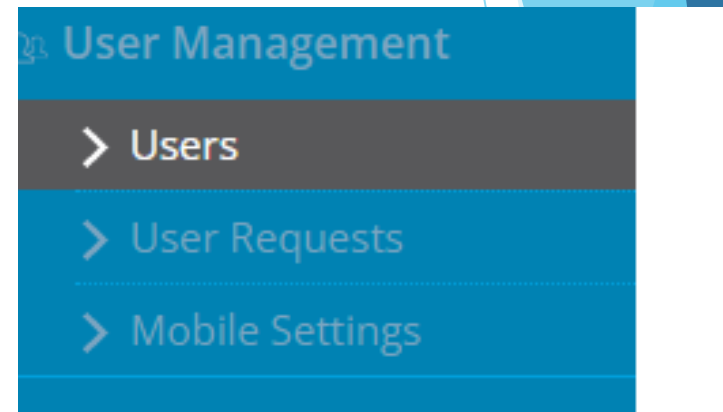


► User Management Menu

Contact Support for all new User setups

► This menu allows you to perform User Management functions for:

- **Users** - listing current and deactivated users and provide the ability to create a user
- **User Requests** - show all completed and pending requests
- **Import Users** - provide the ability to upload a csv containing users to be created and a tickbox to enable Email2SMS for users
- **Mobile Settings** - provide users with the ability to Reply to Mobile and Forward to Mobile.



▶ Reports Menu


Merge Admin

COMPOSE

Messages

Contacts

My Settings

Company Settings

User Management

Reports

> Reports

Support

Links

Log Out

Reports

Source: All

From: 2022-11-18 00:00

To: 2022-11-24 23:59

Run Report

Summary

Users

Messages

Processing...

All Users Delivery Report

Sent - Awaiting Receipt from Carrier

Received

Queued

Blocked

Error

Inadequate Funds

Not Received

Unreachable

Reject

Expired

Disallowed

Status

Count

Totals

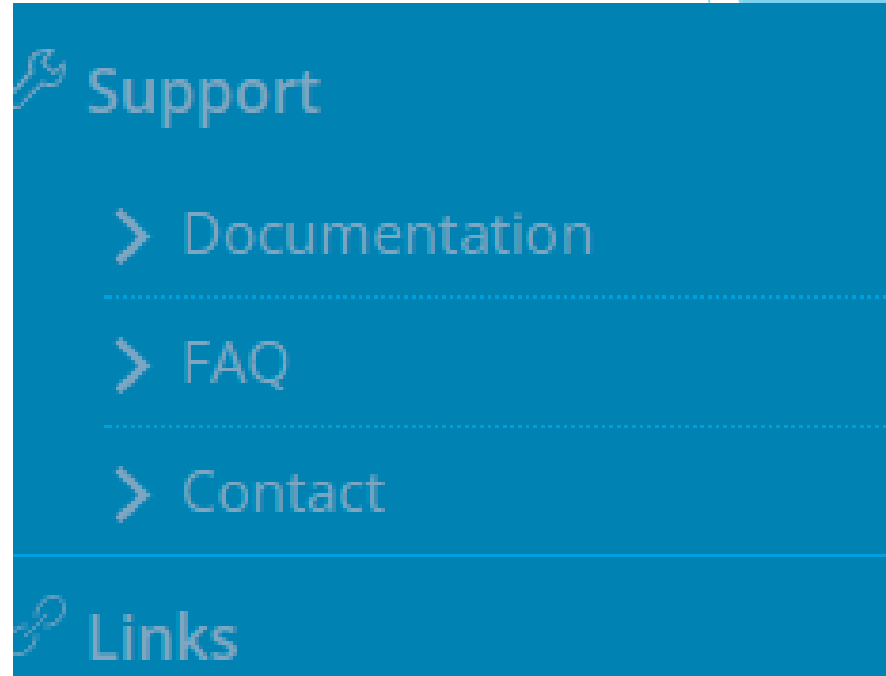
Count

Export Report Data

Normal Reporting, plus the ability to export reports



- ▶ Documentation - provides self-service information to help with understanding Merge Messaging application
- ▶ FAQ - Frequently asked questions
- ▶ Contact - Clicking on this creates an email in a new window to the Support Team



Sending a Message



▶ Sending a message

Compose

To

Contact Name or New Number

+

Who should receive the message

Drag your CSV here or

Select CSV file

Local 0 | Other 0 | Contacts 0 | New Contacts 0

From

System Allocated

☐ Additionally forward any reply to 6449138149

What number should the message be sent from

Message

0 text messages used

😊 👍

Draft saved at 14:14:07

Attachment

Signature

Template

Schedule

Send



Sending a message

1. Enter the recipients' number in International format.. If you are sending to an existing Contact or Group then you can enter the Name or Alias of the Contact - suggested matches will show as you type.
 2. Press the 'plus' icon or hit the Enter Key. Your recipient will be validated and recipient list updated.
 3. Choose the short code connected to your access via the dropdown for the From number
 4. Enter your message into the message field. We will indicate how many text messages are required to send your message. You can even add emojis and attachments (files or web links)
 5. Double check your message and then click Send (to send immediately) or click Schedule (to send at a later time).
-
-  Your message will be sent using our global coverage of mobile networks.
 -  Once you have mastered sending a single message you can even import a list of numbers from Microsoft Excel using the Bulk Uploader functionality.



Message Threading

By default, all messages sent via Merge Messaging application will use message threading so that, if one of your recipients replies, you know which originating message to attribute this reply to. This also allows you to set up forwarding options for when any replies come in. You can do this in your profile page before you send any messages, but you may need to contact your Company Administrator to enable this feature for you.

Preferences

Home Page

Inbox

The page you will see when you log in.

Conversational Message Threading

☐

 **Tick this box**

Group messages into conversation threads or list each message individually?

Message Length

3 parts - 459 characters

You can not exceed your company's multipart limit of 3

Keep messages

For 1 Year

When do we delete old messages?

Scheduling a Message



►Scheduling a message

Scheduled Messages

Today

⏪ ⏩

Time Zone : Pacific/Auckland February 2017

List

Day

Week

Month

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29	30	31	1 10:05 Get donuts	2	3	4
5	6 08:00 Don't forget the Com	7	8 10:05 Get donuts	9	10	11
12	13	14	15 10:05 Get donuts	16	17	18
19	20	21	22 10:05 Get donuts	23	24	25



► Scheduling a message

► Simple to set-up, Merge messaging application allows you to Schedule your SMS Messages for a future time.

- Simply click the Schedule button rather than the Send button. You will then be able to pick a date and time for the delivery.
- The easiest way to schedule a one off message is to use the calendar to find a day, click that date and then edit the time of delivery.
- Alternatively, you can click Schedule again and choose from the delivery options.
- Recurring Messages - When creating or editing a scheduled message, if you want it to repeat then check the Repeats... check box and choose the period type (day, week, month or year) and a number between 1 and heaps.
- Time Zones - you can schedule a message for delivery in a different time zone.
- Scheduling to Groups - If you schedule a message to a Group, the recipients will be looked up as the message is about to be sent.



▶ Bulk Send

- ▶ You can copy a list of numbers directly into the Merge messaging application compose page to box.
- ▶ Alternatively, you can browse to your file of numbers by clicking the bulk send icon to the far right of the to field.
- ▶ Your file can simply contain a list of numbers in international format, with one number per line, or you may wish to use our more sophisticated 'SMS Merge' format.
- ▶ When sending any message you should consider the opt out responses. See the info box below for more information as it is especially important when sending bulk messages.



The background is a blurred photograph of a person's hands. One hand is holding a black smartphone, and the other is holding a glass of orange juice. The person has red nail polish. The scene is set on a wooden table. The image is overlaid with a semi-transparent blue geometric design on the right side.

Using Message Tags

► Using SMS Merge Tags

- SMS Merge brings you the power of Dynamic Tagging to the composition of your SMS Messages.
- Using Merge messaging application SMS Merge Tags you can personalise the content of thousands of SMS so each one of your clients feel like you are TXTing them, and them alone.
- You simply import a CSV file containing fields of data specific to each individual recipient, then add the fields to the message. This allows the message to contain personal information that could include the persons name, location, subscription preferences, favourite colour, clothing sizes, literally any information you have about your customers.

Message

☐ Show Preview

Insert Tags



Hello \${Name}, \${Colour} is now available



▶ SMS Merge Steps

- ▶ Step 1. Prepare a CSV File (Comma Separated Variable) for SMS Merge and Upload it. This file becomes a list of your Recipients.
- ▶ The top line of your CSV file should contain a list of all the fields you want to be able to add to your message, separated by a comma, for example 'Mobile,Name,City,Colour'. The first column should always be the mobile number for the recipients in international format.
- ▶ Each line below the top line should list all the details for each individual recipient in the same order as your fields and again separated by a comma, for example '642715414141,Bob,Hamilton,Brown'

Mobile,Name,City,Colour

642715414141,Bob,Hamilton,Brown

44854212124,Jason,Bristol,Orange

14082225555,Kate,Carcassonne,Red

- ▶ In this example a header row has been included defining the name of the tag you can insert.
- ▶ Using the uploader you can either select and upload your pre-prepared CSV file or simply drag the CSV file into the drag and drop area. Merge will then check to make sure the file is a CSV file and has the above layout and import all your recipients details into Merge ready for you to create your Message and send.



► SMS Merge Steps (continued)

- Step 2. Composing your Message with SMS Merge Tags - simply enter your message text into the Message field and, when you wish to add recipient specific data, click the insert tag button and choose the field you wish to add. Continue entering text and adding SMS tags until your message is complete.
- In the Preview Mode you will see the SMS Merge Tags rendered with the longest value as an example of the message you are sending out. This allows you to keep track of your Message Parts and Character Count as you compose your message.

Message

☒ Show Preview

Insert Tags

Hello Jason, Orange is now available



► SMS Merge Steps (continued)

► SMS Merge Tags and Drafts

Composer automatically saves your messages as you are working and this applies to SMS Merge messages also so you can come back later without losing your Recipients, or your Message Content.

► Entering Merge Tags directly

Rather than adding Tags via the Insert Tag dropdown menu, more advanced users can simply type in a "\$" symbol followed by the Merge Tag name in Parentheses. For example to add the Name merge tag a you would type ``${Name}``

► Ready, Set.... Send

Once you are happy with your SMS Merge message and have checked how it looks using the Preview Mode you can send the message immediately, or schedule the message to be sent later.

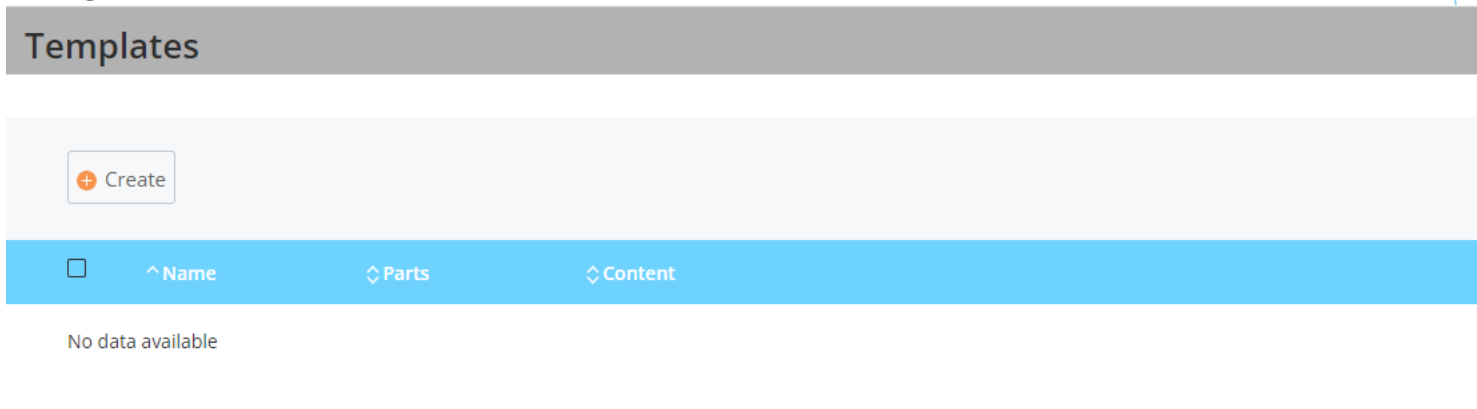


Using Message Templates



► Message Templates

- Templates allow you to create and save messages that you send often or may need in an emergency. You can share them (admin users only) or duplicate/copy them as required via the Template Menu
- Templates can be named so they are easily recognised in the template list when creating a message
- You can send a template from the Templates Section. Alternatively, you can select a template from the drop down list from the Compose page and through a Quick Reply message

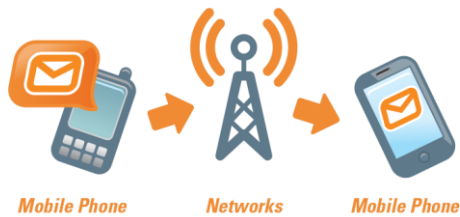


Some Definitions



► A2P vs P2P

- In short, Short codes vs Long codes
- P2P (Person-to-Person/Peer-to-Peer) messaging is the process of exchanging SMS messages between one mobile phone and another via a valid mobile network.



In the image above, both the sender and receiver of the SMS messages are subscribed to a mobile operator. Once the SMS message is sent from the sender's mobile phone, the SMS is sent to the network operator and is then delivered to the recipient's mobile phone. These use cases include group chat applications, anonymous dating applications, SMS on virtual phone numbers like Google Voice, etc.



► A2P vs P2P (continued...)

A2P (application-to-person) messaging on the other hand is the process by which messages are sent from an application, usually a web-based platform, to a mobile user. Messages that do not originate from a mobile device with a SIM card are regarded as A2P messages (excluding only Call Me messages). Popular A2P examples include critical alerts, automatic online booking confirmations, marketing efforts and real-time notifications.



Application to Person, or A2P, messaging is one-way SMS to which recipients are not expected to reply. A2P messaging includes but is not limited to marketing messages, appointment reminders, notifications and pin codes.



▶ MO/MT

MT A message is sent from a short code to a handset

MO A message is sent from a handset to a short code

Standard vs Zero-rated Short codes

Standard short codes - The handset will be charged to send a message to the Short Code.

Zero-rated short codes - Where our customers ensure handsets are never charged for messages to their contact base, and they pay for any charges on both legs (MO and MT)

API (Application Programming Interface)

An API is defined as a set of specifications such as Hypertext Transfer Protocol (HTTP) used to request messages, along with a definition of the structure of response messages usually in an Extensible Markup Language (XML) or JavaScript Object Notation (JSON) format.



Thank you, any questions?



Contact: support@merge.nz

