

# SMS User Guide



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## 1. Introduction:

MOBtexting, Global CPaaS has always succeeded with a client-centric approach. This guide will walk you through the functionality of our messaging platform through which you can send large volumes of SMS to your customers. Scroll down to understand the step by step procedure of operating the application detailed as per each feature. Learn to sign up and access the application. By the end of the guide, you'll be able to operate the application at ease without almost no external support.

Our messaging application enables your business to send huge volumes of messages within seconds globally to any number. You can also use value-added services like Smart Link URL Shortener and Number lookup for HLR information through our platform. This manual helps you understand how to use the application and has feature-wise detailing.

## 2. Getting started with MOBtexting:

To begin with, the following are the actionable tasks that can be carried out using our messaging Platform:

1. Create large SMS campaigns
2. Send Personalised Messages
3. Share and track shortened URLs in the SMS
4. Send Unicode messages
5. Lookup for HLR information
6. Schedule SMS campaigns
7. Split large campaigns into multiple bundles

Global Messaging application enables you to manage end to end SMS services, right from creating a Sender ID to monitoring campaign performance. To optimize messaging through third-party platforms, we offer 'Plugins' that inherit the functionality of SMS into the application of your choice.

## 3. Accessing Global Messaging Platform

To get started with accessing the application, follow the steps below:

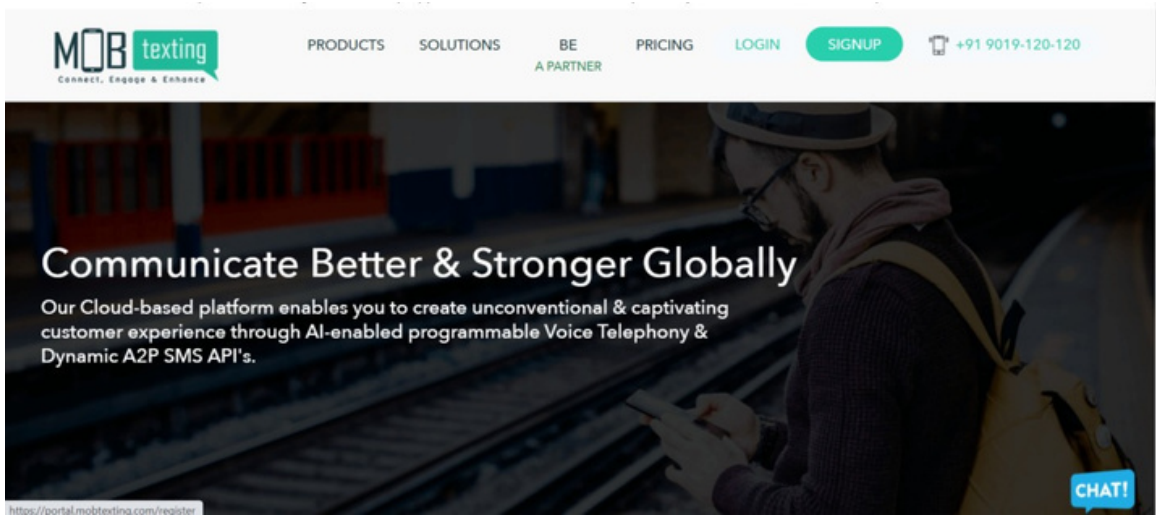
Step 1: In your browser, type in the URL <https://portal.mobtexting.com/login> Step 2:

Enter the username and password to log in

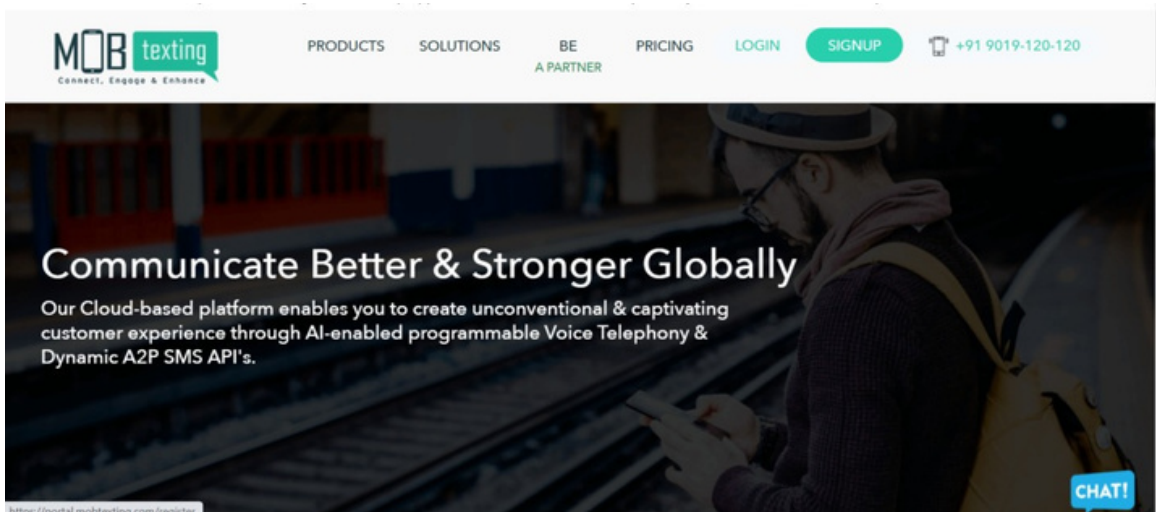
Step 3: Click on the Sign-in button

## Access for the new user:

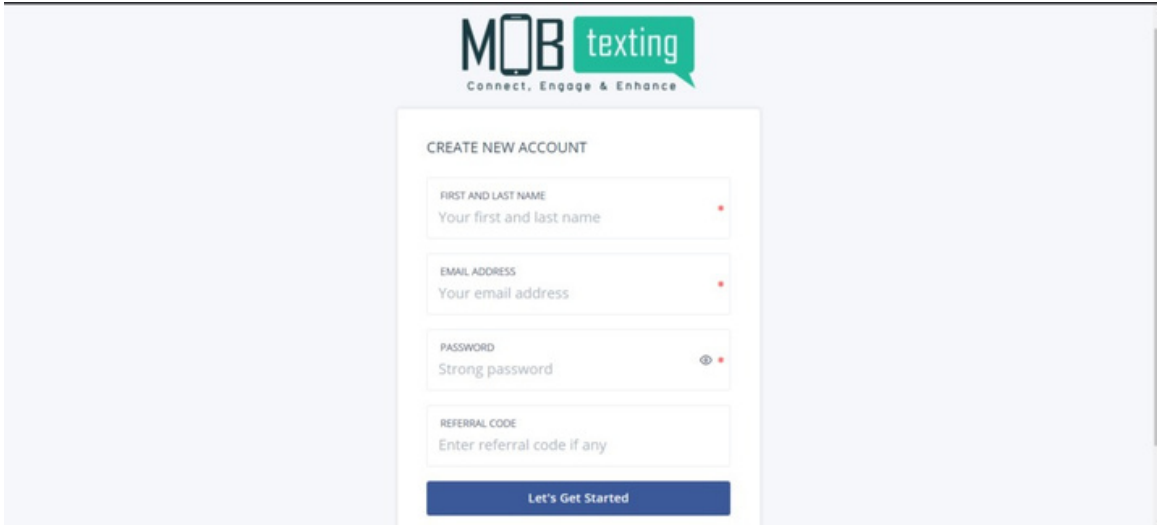
1. Visit <https://www.mobtexting.com/>



2. Click on Sign-Up at the top of the page.

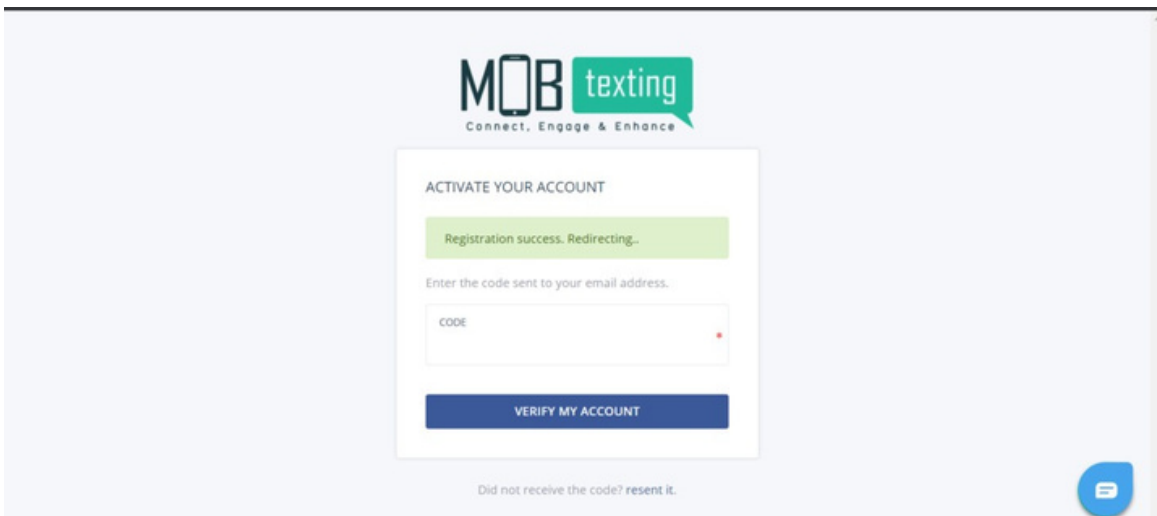


3. Fill up all the required fields. Please provide a valid email address as we verify it.



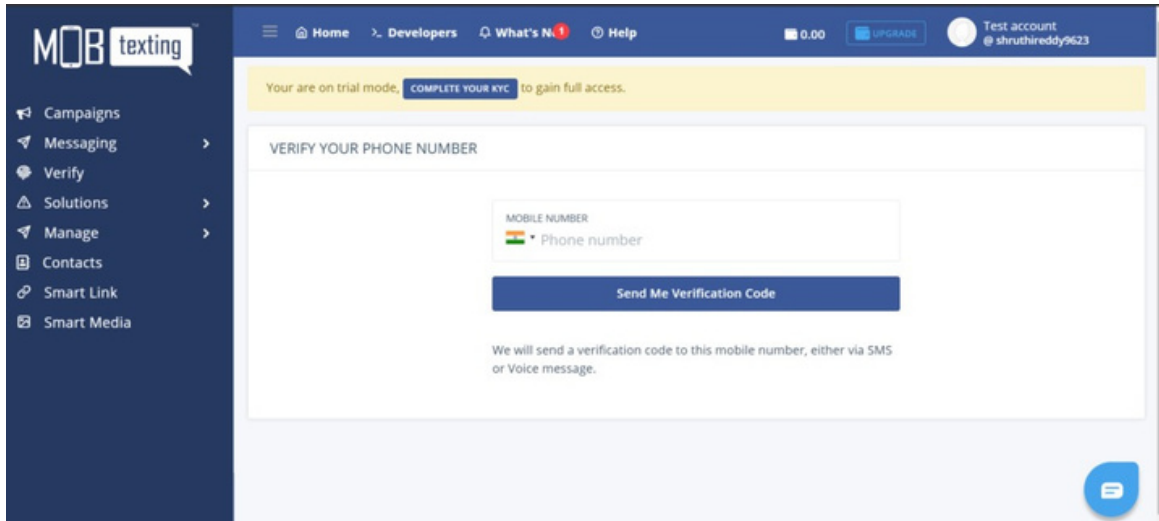
The screenshot shows the 'CREATE NEW ACCOUNT' form on the MOBtexting website. The form is centered on a light blue background. At the top of the form is the MOBtexting logo and tagline 'Connect, Engage & Enhance'. Below the logo, the title 'CREATE NEW ACCOUNT' is displayed. The form contains four input fields: 'FIRST AND LAST NAME' with the placeholder 'Your first and last name', 'EMAIL ADDRESS' with the placeholder 'Your email address', 'PASSWORD' with the placeholder 'Strong password' and a visibility toggle icon, and 'REFERRAL CODE' with the placeholder 'Enter referral code if any'. A blue button labeled 'Let's Get Started' is positioned at the bottom of the form.

4. Enter the OTP sent to the email address.

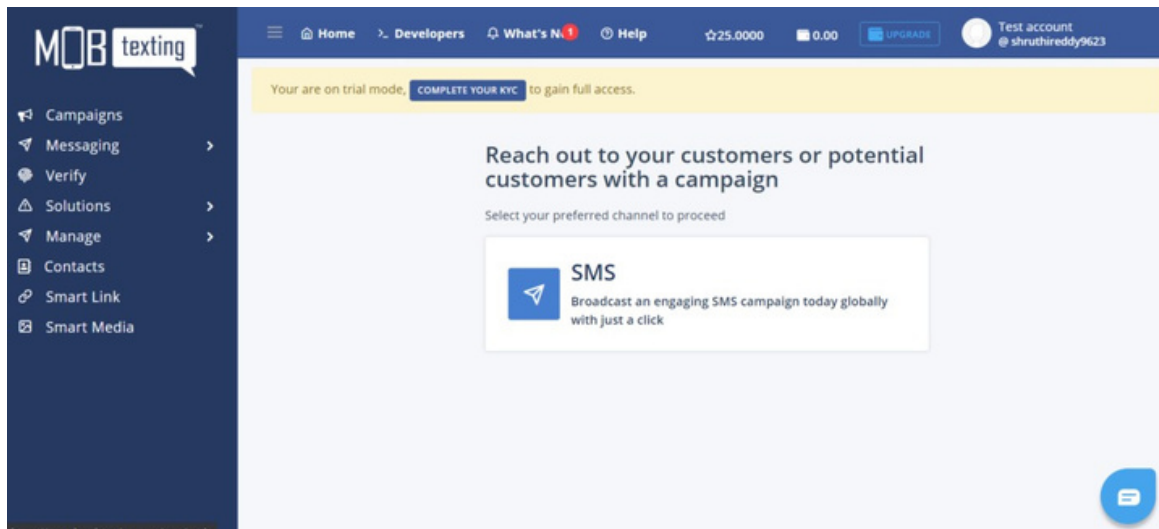


The screenshot shows the 'ACTIVATE YOUR ACCOUNT' form on the MOBtexting website. The form is centered on a light blue background. At the top of the form is the MOBtexting logo and tagline 'Connect, Engage & Enhance'. Below the logo, the title 'ACTIVATE YOUR ACCOUNT' is displayed. A green success message 'Registration success. Redirecting..' is shown at the top of the form. Below the message, the text 'Enter the code sent to your email address.' is displayed. The form contains one input field labeled 'CODE'. A blue button labeled 'VERIFY MY ACCOUNT' is positioned at the bottom of the form. At the bottom of the page, there is a link that says 'Did not receive the code? resent it.' and a blue chat icon in the bottom right corner.

5. After email verification, you need to verify your phone number.



6. After phone verification, you will be getting 25 free SMS credits.



7. Click on 'Messaging' on the left tab. You can see the list of features here that you can get from MOBtexting.

## Guide to reset a new password:

If you have forgotten the password, click on the 'I Forgot Password' button on the login page to change your password. Enter your username for which you want to reset the password. You will receive a 6 digit code to your registered email id and after entering the code on the login page, you will be redirected to the 'Change Password' page. Set a new password and you're set to re-login!

## Checklist to configure your account:

After successful login to your Global account, you need to consider the prerequisites given below:

1. Understanding Pricing Structure: Get familiar with the Pricing Details from your account manager.
2. Adding Credits: Request our Support team to add credits to your account if the minimum balance is not all by yourself required to send SMS campaigns.
3. Creating Sender ID: Get the DLT approved Sender-ID (The unique identity to send messages to your customers) from the operator. Once it's approved, request for adding a Sender ID. Once we approve your Sender ID, you can create messaging campaigns.
4. Successful KYC Verification: Make sure you must have gone through our KYC Verification to enjoy an uninterrupted service experience.

## 4. Manage Items

### Creating Sender ID from DLT Platform:

A sender ID is a unique code that represents your brand identity to the customers. It's under the name of the sender ID that your messages will be delivered to the customer. Create a unique Sender ID to send out SMS campaigns using our Global Messaging platform.

We have a detailed blog that explains how to create Sender-ID on the DLT platform and get it approved.

SmartPing live -[Click Here](#)

Airtel -[Click Here](#)

JIO-True Connect -[Click Here](#)

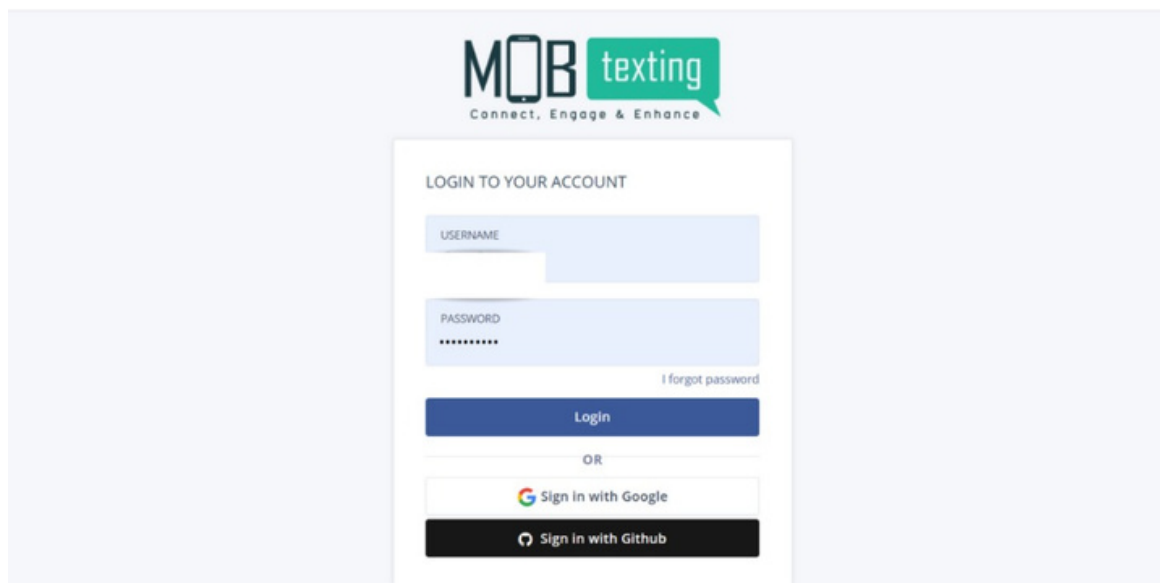
Vodafone -[Click Here](#)

After this procedure, you should import the Sender-ID to MOBtexting SMS Portal. To do so, please follow the steps.

## Steps to upload Registered Sender-ID on MOBtexting dashboard

Step 1: Login into theMOBtexting dashboardwith theUsername and Password which you used during the Sign-Up.

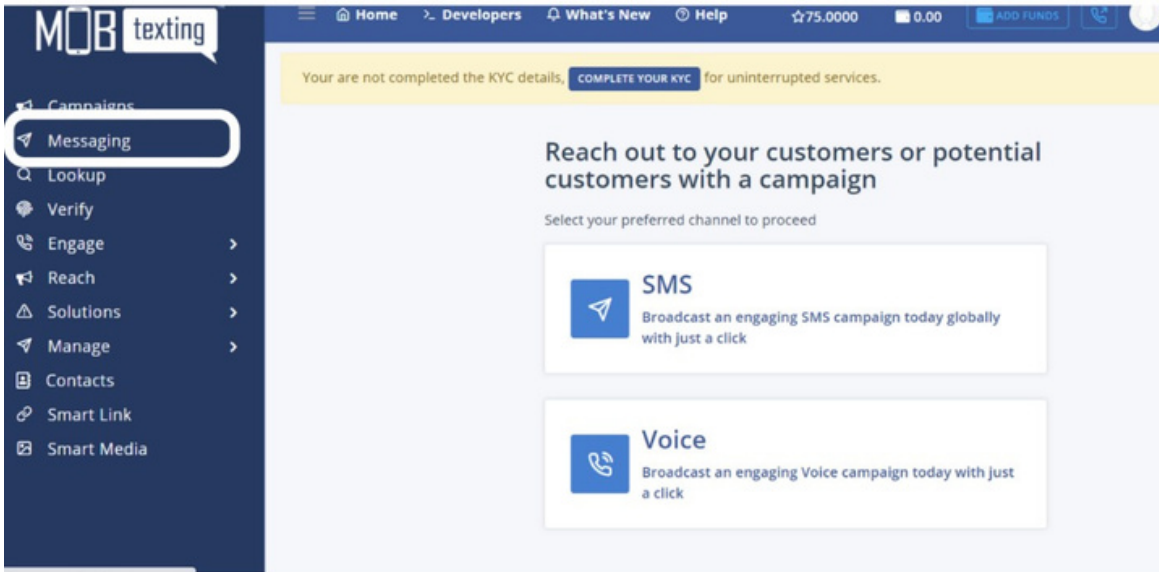
<https://portal.mobtexting.com/>



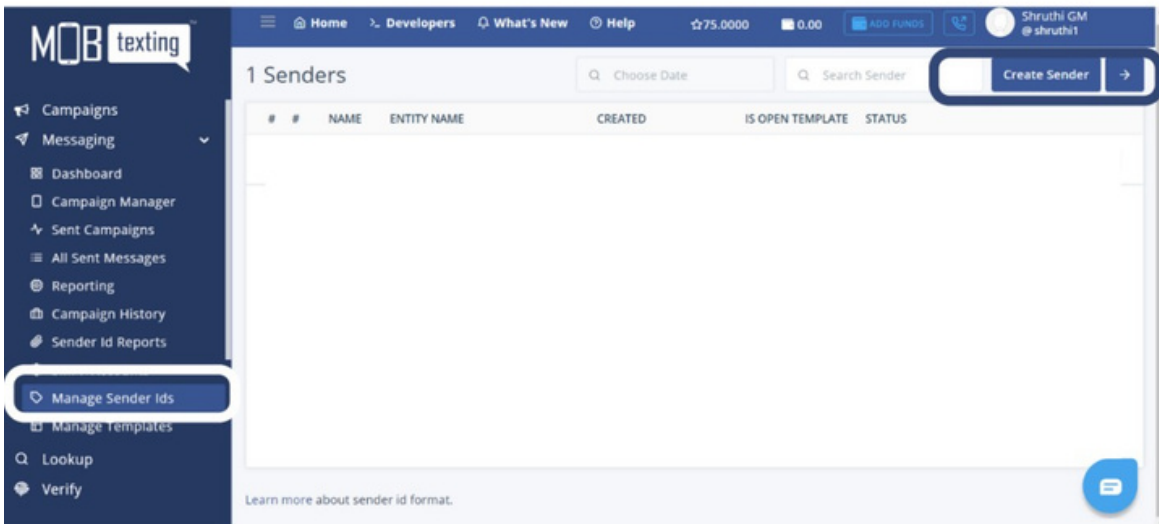
The image shows a screenshot of the MOBtexting login page. At the top center is the MOBtexting logo with the tagline "Connect, Engage & Enhance". Below the logo is a white login form titled "LOGIN TO YOUR ACCOUNT". The form contains two input fields: "USERNAME" and "PASSWORD". The password field is masked with dots. To the right of the password field is a link that says "I forgot password". Below the input fields is a blue "Login" button. Underneath the "Login" button is the text "OR". Below "OR" are two social login options: "Sign in with Google" (with the Google logo) and "Sign in with Github" (with the Github logo).



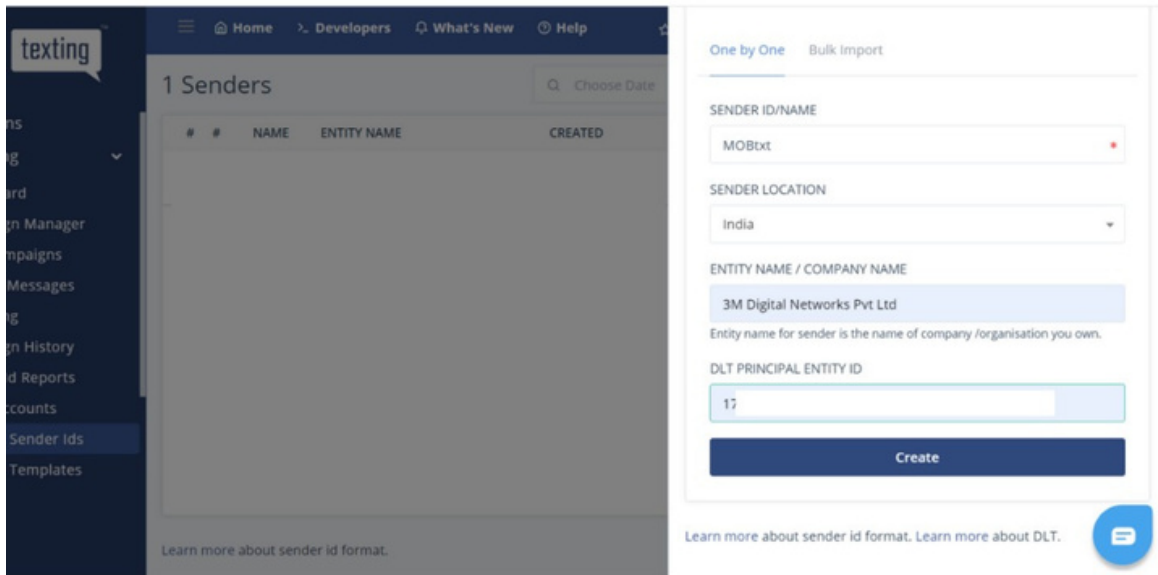
Step 2: After entering the correct details, it takes you to our portal. Click on Messaging which is on the home page.



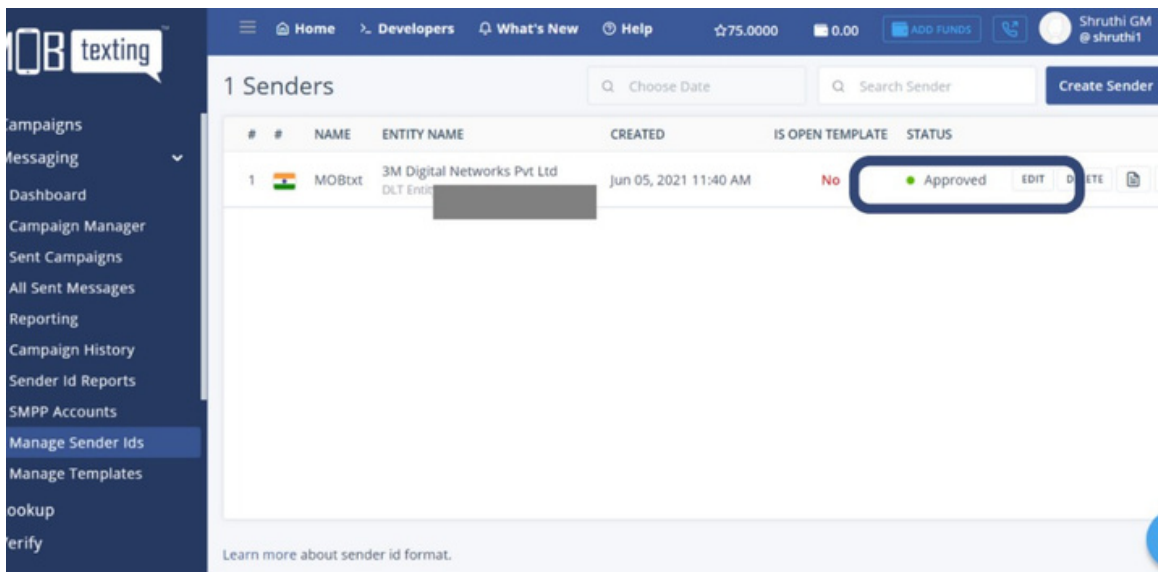
Step 3: Now click on Manage Sender Ids. To create a new sender id, click on Create Sender.



Step 4: When your sender id on the DLT portal gets approved, you will receive an email confirmation that includes Sender ID, Entity Name, and DLT Principal Entity ID. After this allow us 15min of time to verify and approve the Sender ID on our portal. You can either do Bulk import or upload each sender id individually.



Step 5: Once it gets approved, the status will be updated to Approved.



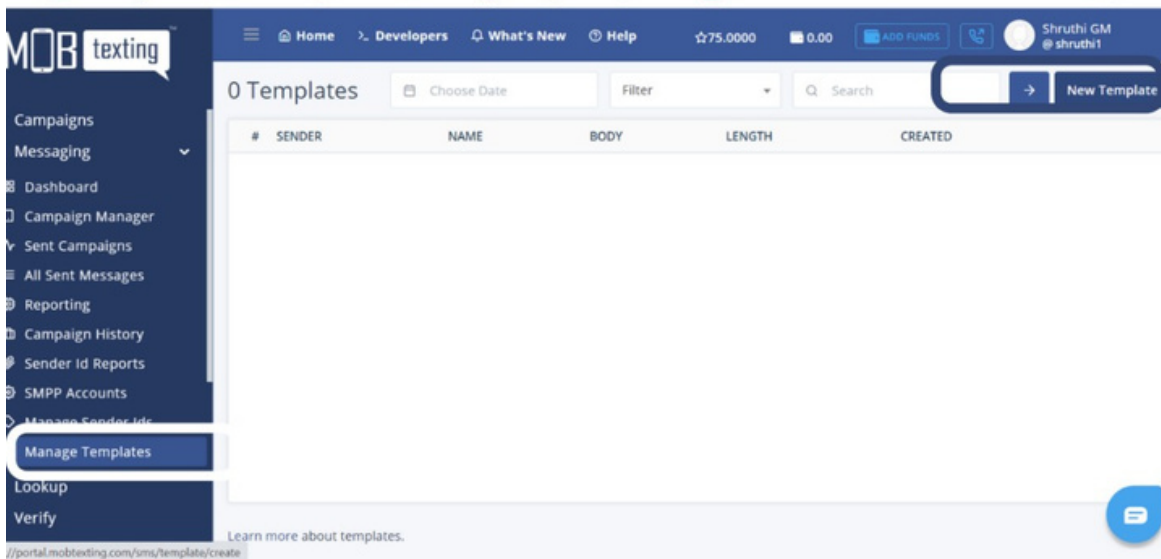
## Creating and Managing templates:

A Template is a predefined format of a saved message. The template allows you to use a single message on multiple instances with changeable dynamic field entries. Templates eradicate spelling and typo errors by providing a standard format of the text that can be reused again.

Example: Bank Transactions- when the user withdraws cash from ATM, an automated message is triggered with his account balance. In this case, the template is used with transaction-specific dynamic fields (In this case, the dynamic field can be the username, date and time of transaction and account balance)

Steps to upload registered template:

Step 1: Click on Manage Templates. Now click on New Template.



Step 2: Select Sender ID for which you want to register the template. Add other mandatory details in the required fields. Please select the correct template type to avoid template rejection on the portal.

MOB texting

Home Developers What's New Help

0 Templates

Choose Date Filter

#	SENDER	NAME	BODY

Learn more about templates.

MOBtxt

NAME  
Payment Reminders

TEMPLATE TYPE  
Service Explicit

DLT TEMPLATE ID  
880734674653d

TEMPLATE CONTENT 0/0  
Insuring your vehicle is dull. We'll take the strain and find the best deal. Call ABC insurance on (#var#) or reply yes. To optout text abcd to 89022

Variables can mentioned as (#var#), (#var#), (#var#) ... etc.

Content in English Language?

Create

Step 3: Allow us 15minutes to verify and approve the template.

MOB texting

Home Developers What's New Help 75,000 0.00 Template saved successfully

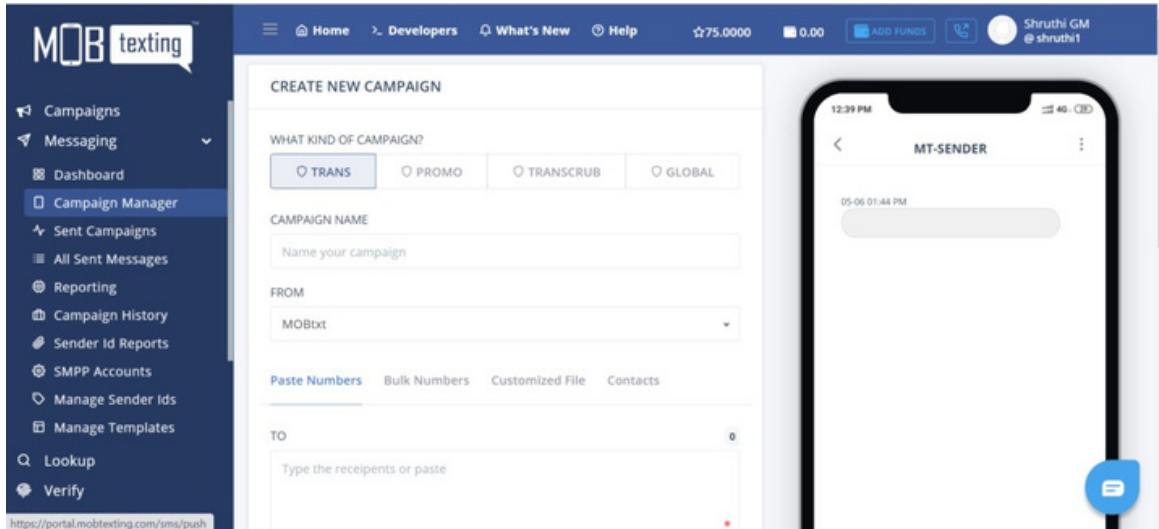
1 Templates

Choose Date Filter Search New Template

#	SENDER	NAME	BODY	LENGTH	CREATED
1	MOBtxt Service Explicit	payment-reminders Templat DLT id: [REDACTED]	Insuring your vehicle is dull. We'll take the strain and find the best deal. Call ABC insurance on ((1)) or reply yes. To optout text abcd to 89022		Jun 05, 2021 10:55 PM Approved

Learn more about templates.

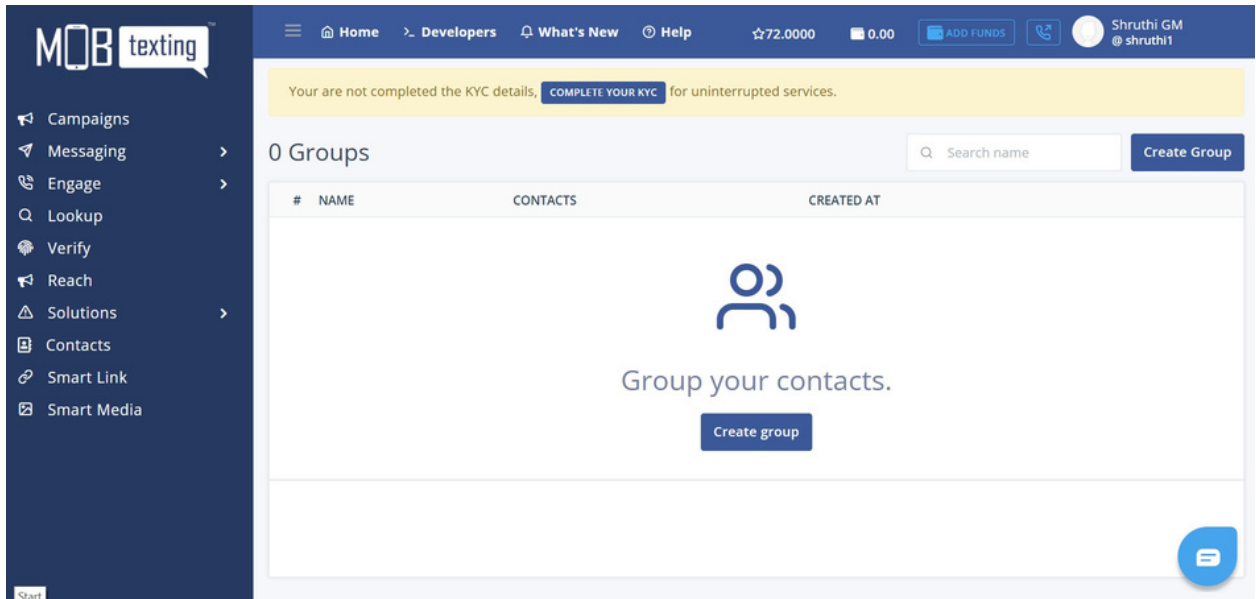
Step 4: Now that your sender id and template are approved, you can start the SMS campaign on MOBtexting.



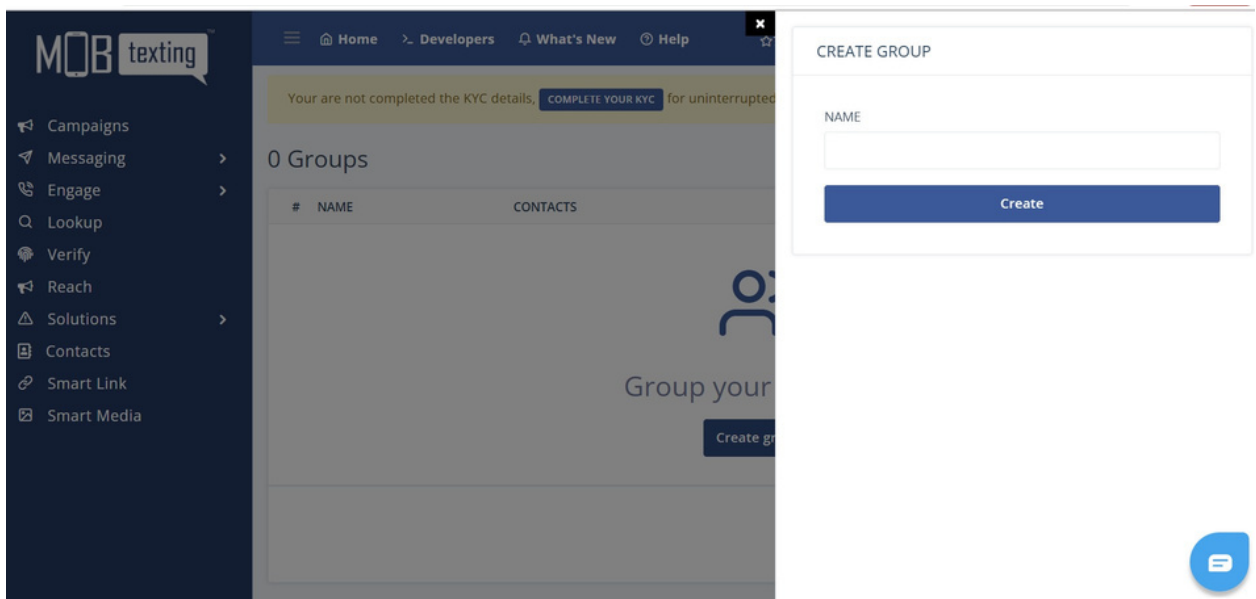
## 5. Creating and Managing Groups

Do you have a list of users to send reminders to? Do you have a set of users who shopped for a category of products? Do you have a list of customers to send an announcement to? Then you need to create a “Group” to send event-specific reminders, details or announcements too. The group is a set of mobile numbers imported from your customer database. It proves to be handy while sending out bulk SMS or to a group of numbers. It saves the trouble of adding mobile numbers one by one individually. You can always add or delete any number from the groups, which makes them more convenient to use.

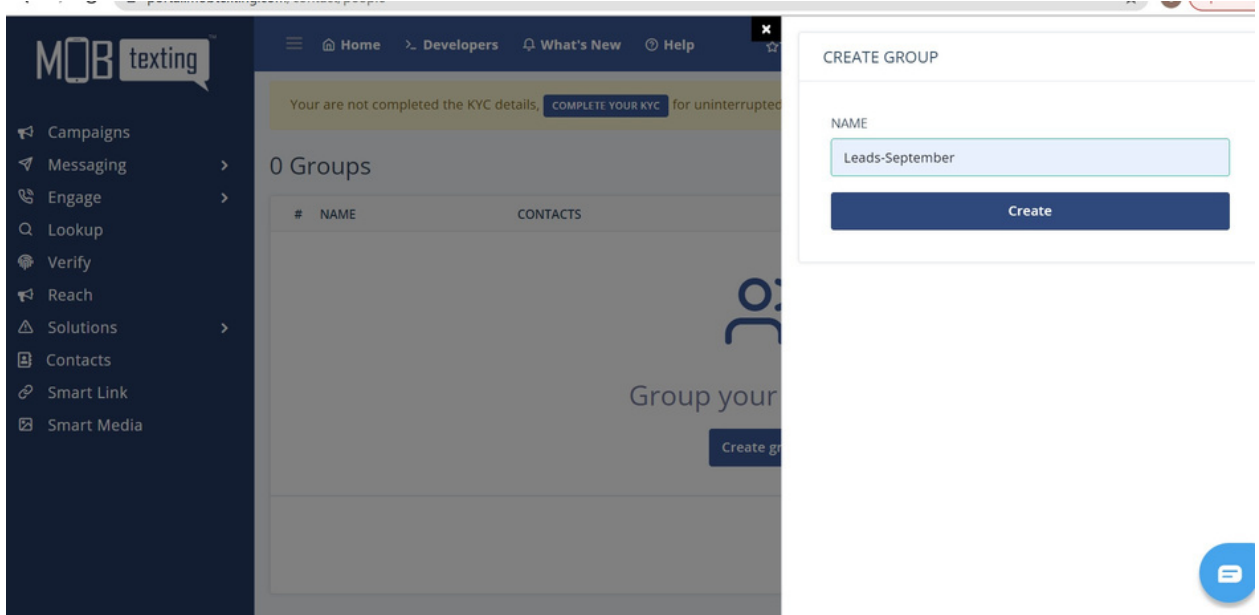
Step1: Click 'Contacts' from the Menu Bar.



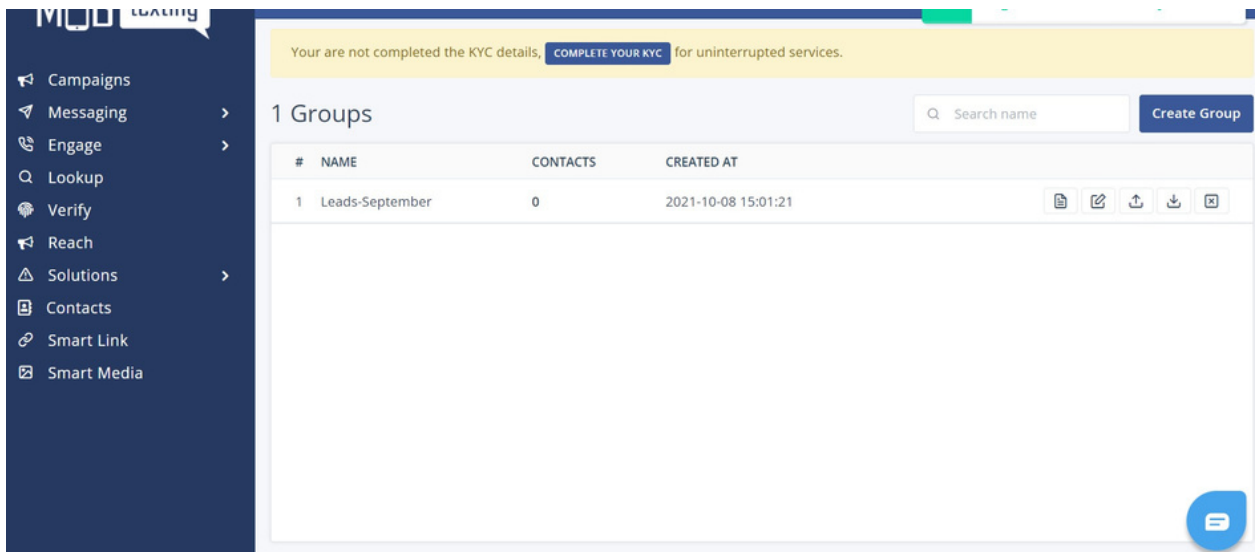
Step2: Click on 'Create Group'.



Step3: Give a name for the group which you're creating. For example, I have given 'Leads-September' as my group's name. Save the details.



Step4: Once your group is created you can add numbers to this group from Excel, CSV, and Text files by clicking on the Import Contacts in the Actions column.



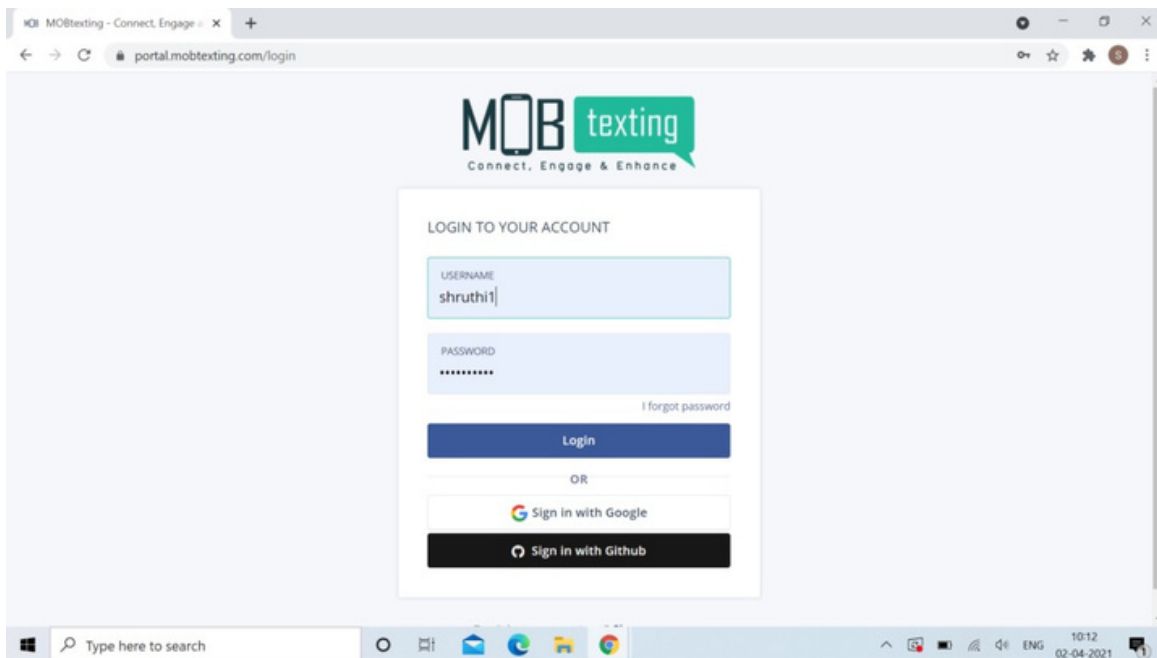
Step5: To export all the numbers in the group to an Excel file click on the download icon from the top right corner. Your list will be downloaded to your system.

## 6. Online Recharge

So to ease our client experience and to make our portal a self-servicing platform, now you can easily recharge for SMS. You can top-up your SMS credits on the go.

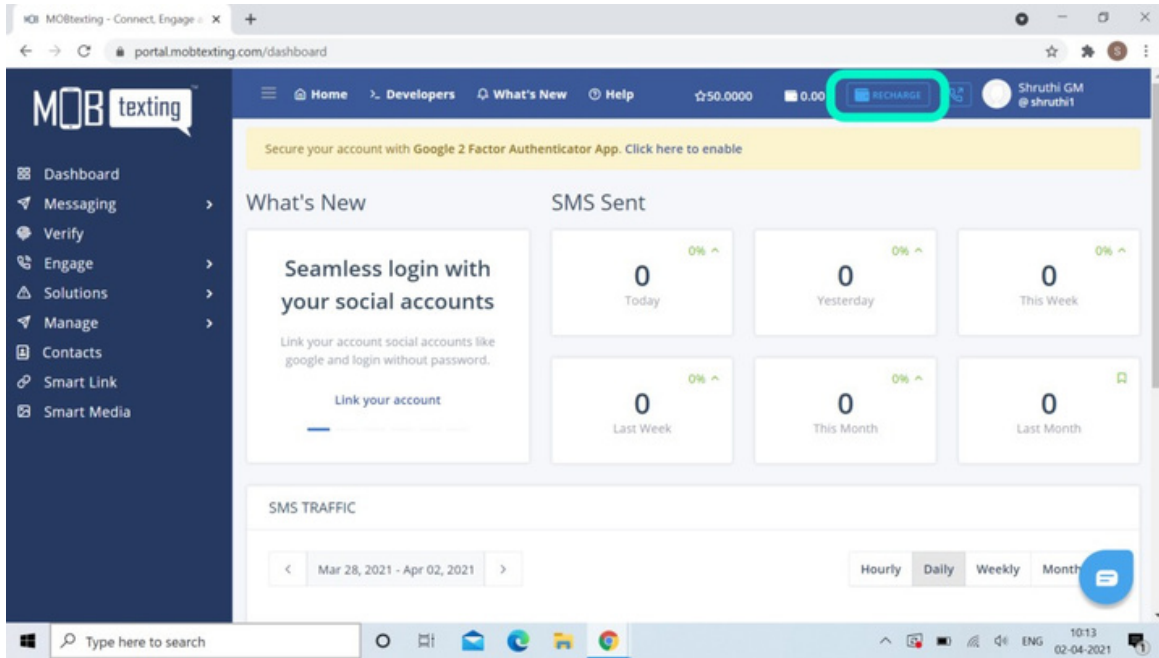
Follow the steps to do the same:

Step 1: Log in to your MOBtexting portal. Enter username and password.

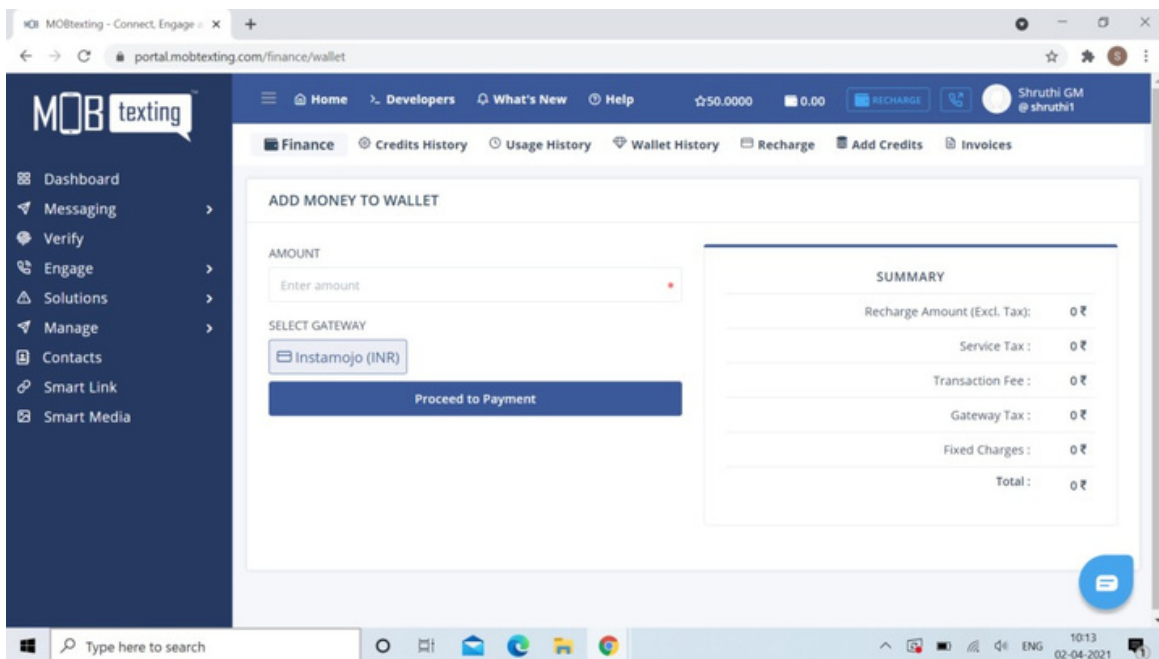




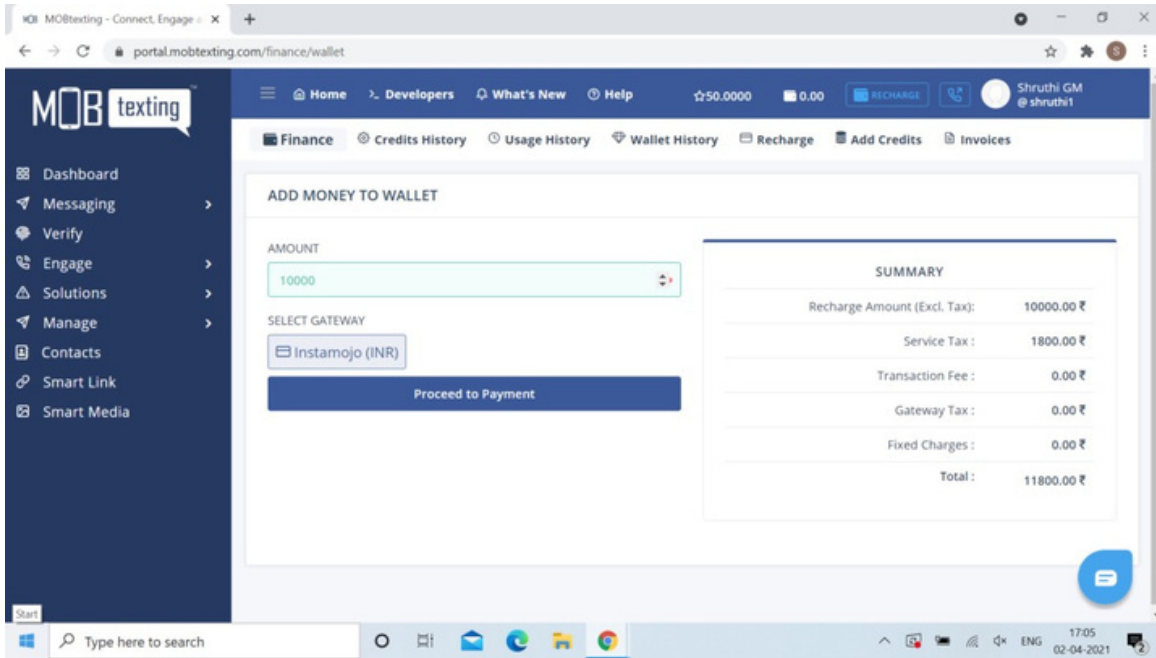
Step 2: This is how the home page of the MOBtexting portal looks like. Click on the recharge option on the top right.



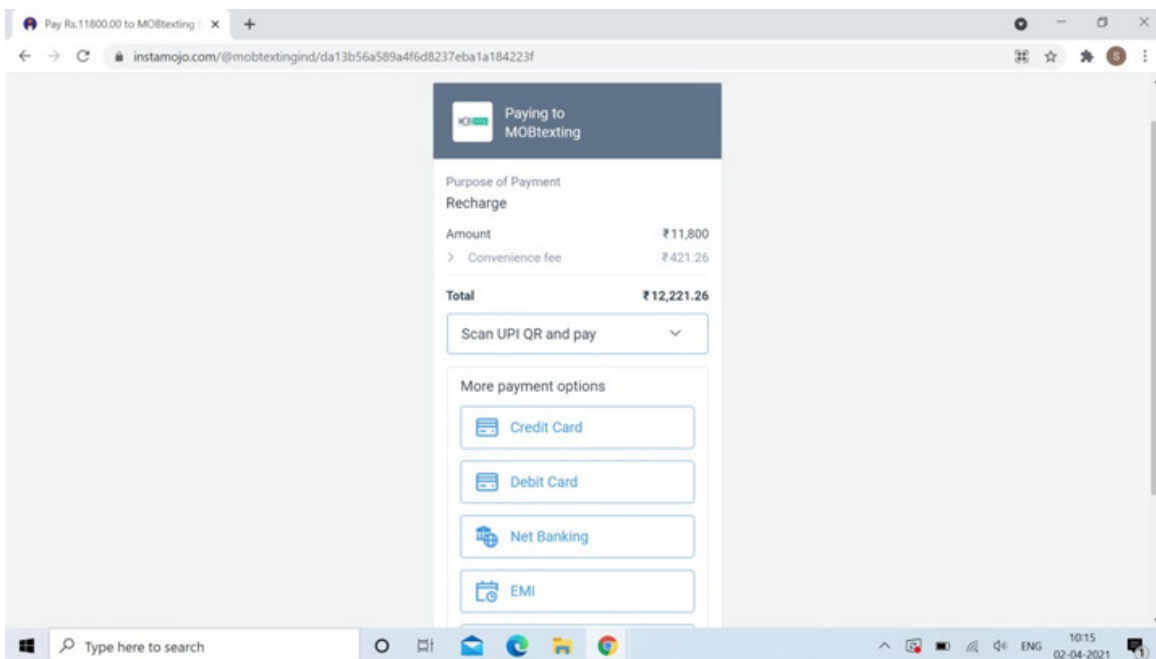
Step 3: Once you click on Recharge, enter the amount for which you want to recharge.



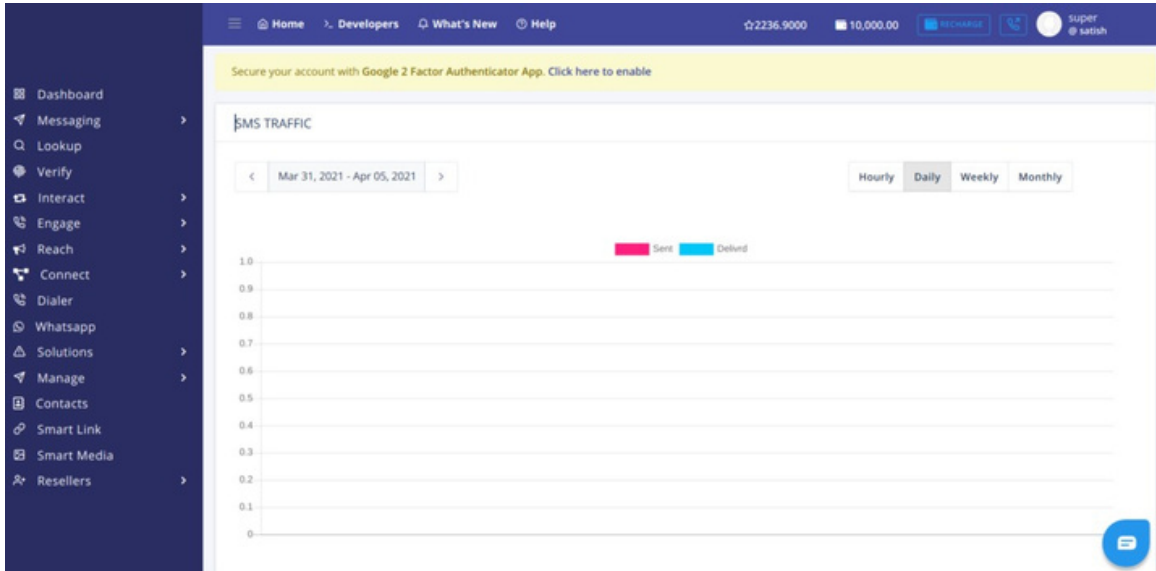
Step 4: For example, I have entered Rs.10,000 in the amount column. To the right side, you can see the total amount is added with 18% GST. The total payable amount is Rs. 11,800.



Step 5: Click on Proceed to Payment now. You can make the payment by various payment methods. The convenience fee of Rs. 421.26 will be charged.



Step 6: You can see the recharged amount on the top right column after payment confirmation.

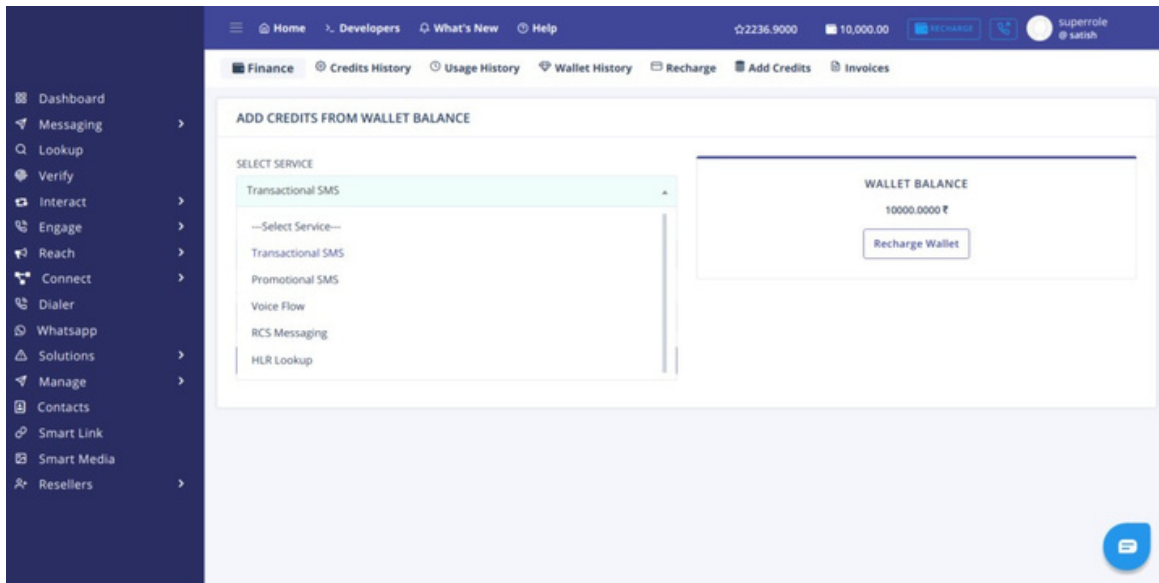


Step 7: Click on the Add Credits and the following page will appear. Fill in the following details like Select Service, Enter Credits. Based on the number of credits entered and the service selected, the system will automatically calculate the amount to be deducted.

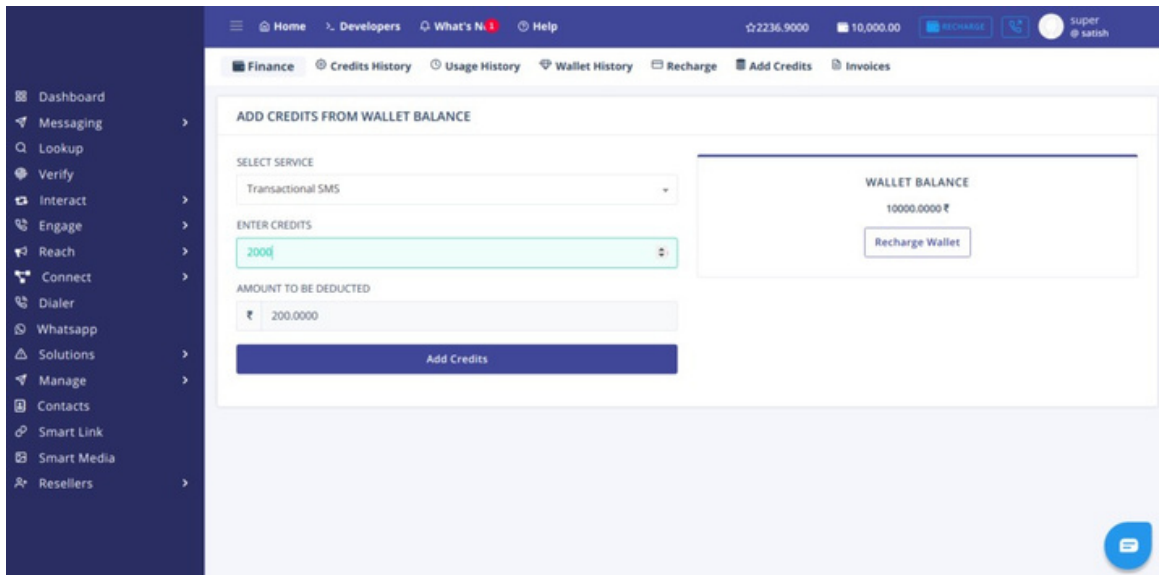
The screenshot displays the 'ADD CREDITS FROM WALLET BALANCE' form. The top navigation bar includes 'Home', 'Developers', 'What's New', and 'Help', along with account balances and a 'RECHARGE' button. The left sidebar lists various dashboard options. The main form area contains the following elements:
 

- Navigation:** Finance, Credits History, Usage History, Wallet History, Recharge, Add Credits, Invoices.
- Form Fields:**
  - SELECT SERVICE:** A dropdown menu with the placeholder text '--Select Service--'.
  - ENTER CREDITS:** A text input field with the placeholder text 'Enter no. of credits'.
  - AMOUNT TO BE DEDUCTED:** A text input field with a rupee symbol (₹) on the left.
- Summary Box:** A box on the right side showing 'WALLET BALANCE' of 10000.00000 ₹ and a 'Recharge Wallet' button.
- Action:** A blue 'Add Credits' button at the bottom of the form.

Step 8: Select the type of service from the drop-down.



Step 9: Based on the number of credits entered and the service selected, the system will automatically calculate the amount to be deducted from the wallet.



Step 10: You can start using the services for which you have recharged and the credits will get reflected for the same.

## 7. Sending SMS

In this section of the guide, let's get into the methodology of choosing the type of SMS to be sent. You need to choose the type of messages as per your business requirement. There are times when your business needs to make a quick announcement, your business might want to engage only the subscribers on multiple occasions, or you might want to customize a message only to a specific message group. Based on the requirement, our messaging application comes with 5 different types of campaigns that can be created, which are listed below:

### Transactional SMS:

Businesses can reach subscribed customers directly to share important details that aren't promotional in nature.

**Promotional SMS:** Promote your products or services and generate customer interest.

**Transscrub SMS:** SMS with Non-Promotional Sender-ID with promotional content.

**Global SMS:** Send SMS to 195+ countries from our SMS Application.

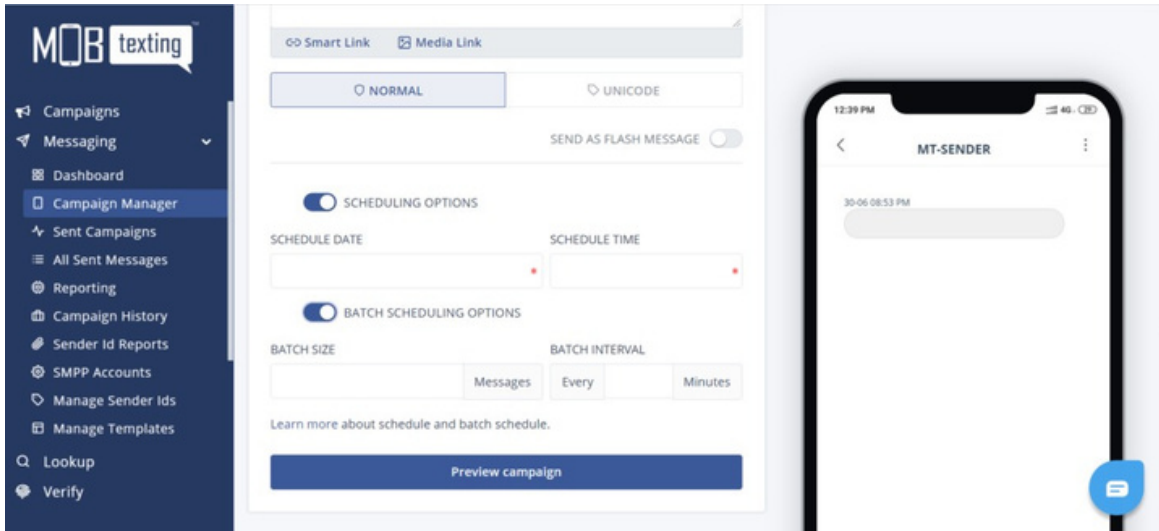
### Unicode SMS:

Create messages in the language of your choice. Let your customers get the look and feel of their own language.

### Scheduling SMS

Using this feature of ours You can schedule the SMS to a specified time and trigger it to a phone number or a group. We have enabled this feature in both of our panels as well as API. Using this feature the next day of the campaign can be pre-scheduled and be work-free for the next day.

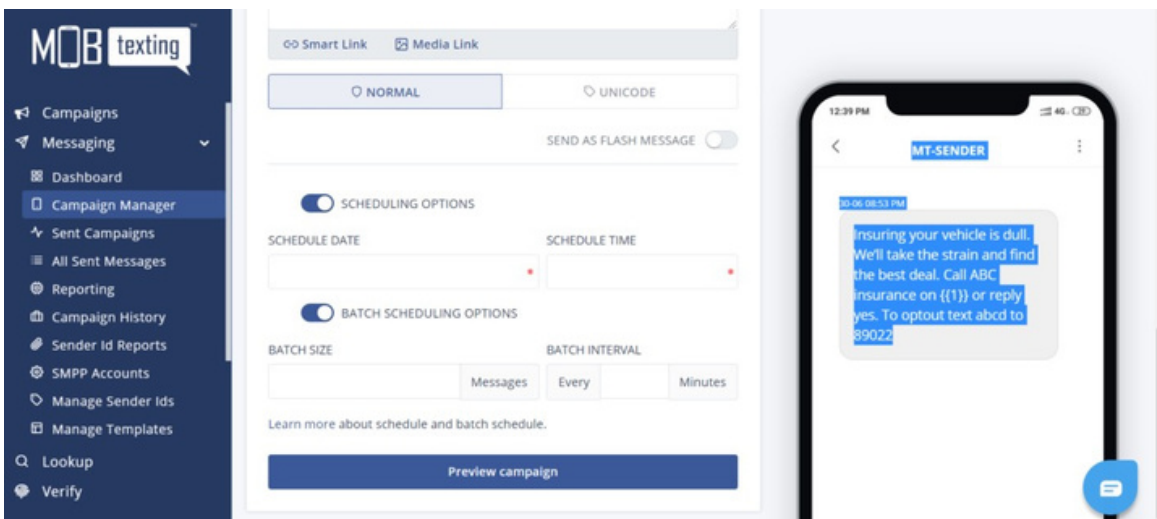
We will allow up to 30 future days for schedule. You are able to cancel the scheduled SMS before 5 min of execution.



## Batch Schedule:

This feature also allows you to schedule an SMS, But at different time intervals and that is called batch schedule where you can upload bulk contacts or multiple numbers and schedule each part of the uploaded contacts lists at different time intervals. This feature is built to ease the bulk traffic hitting the server at once, instead of at each time interval the queue is pushed and the campaign is executed without any ups and downs.

Preview submission:



After selecting a preview submission here, customers can see the details like Message, Message length, Sender, DLT Template Id, Total Numbers, Units, Charges.

## Sent campaign

Menu => campaign history

Customers can see sent campaign details like Name of the campaign, Total Numbers, charge, Delivery percentage, Details(status wise details), Status(Success or Failed).

Download – Customers can download entire campaign details.

View Message- Customers can see the Number wise details of the campaign.

Resubmit – Customers can resent the same campaign.

All sent messages –

Menu=> All sent messages.

Customers can see the Number wise details of the campaign.

## 8. Reporting

Businesses are driven by data-aided decisions, and to support the same, MOBtexting offers quantitative and qualitative data of the user performance and behavioral metrics through

'Reports'. This feature lets you keep an eye on the SMS campaigns sent from your account. A report of all the items sent such as Sender IDs, Dates, Number of SMS sent, and other details are available in the 'Reports' panel.

To view Sent Messages, follow these simple steps:

Step1: Click on Reporting

Step2: Request for a detailed report. The report will be mailed to you.

Note: You get to view the following parameters: ●

Status of message

- Date and time of the sent message
- Delivered time
- Recipient number
- Credits charged.

## 9. Pricing

Visit [Link](#) for a detailed understanding of pricing.

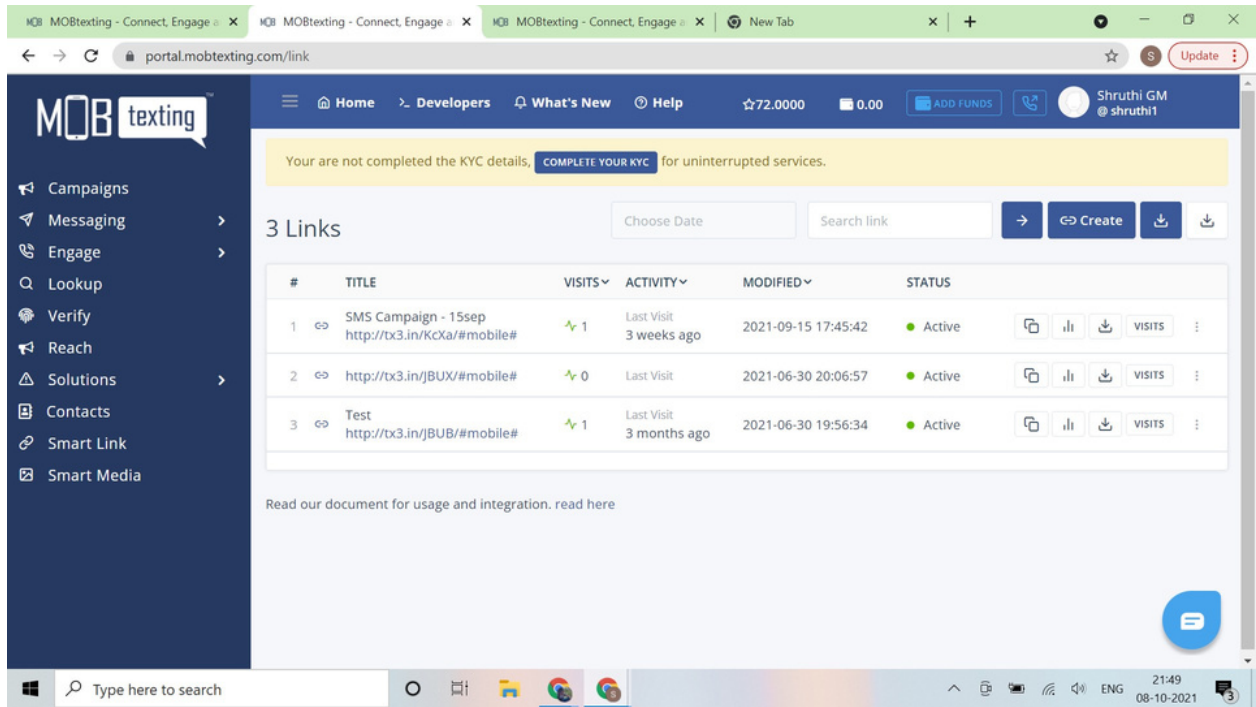
## 10. Smart Link

Businesses need dynamically shortened web links to ensure that they don't occupy redundant lengths of the SMS. Smart Link will help you shorten any long URL. You can use this shortened URL within your SMS to further track your customer's real-time data. Smart Link URL will redirect your customers to the respective web page.

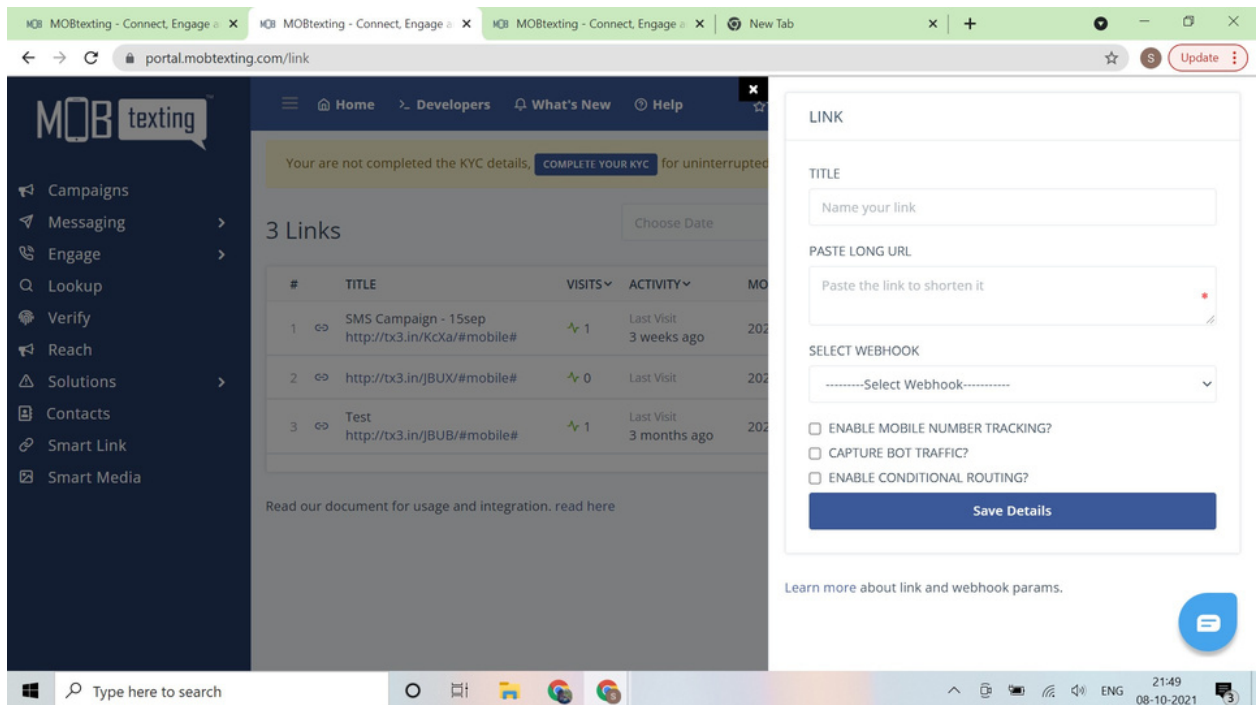
Follow the steps below to create a short URL using Smart Link:



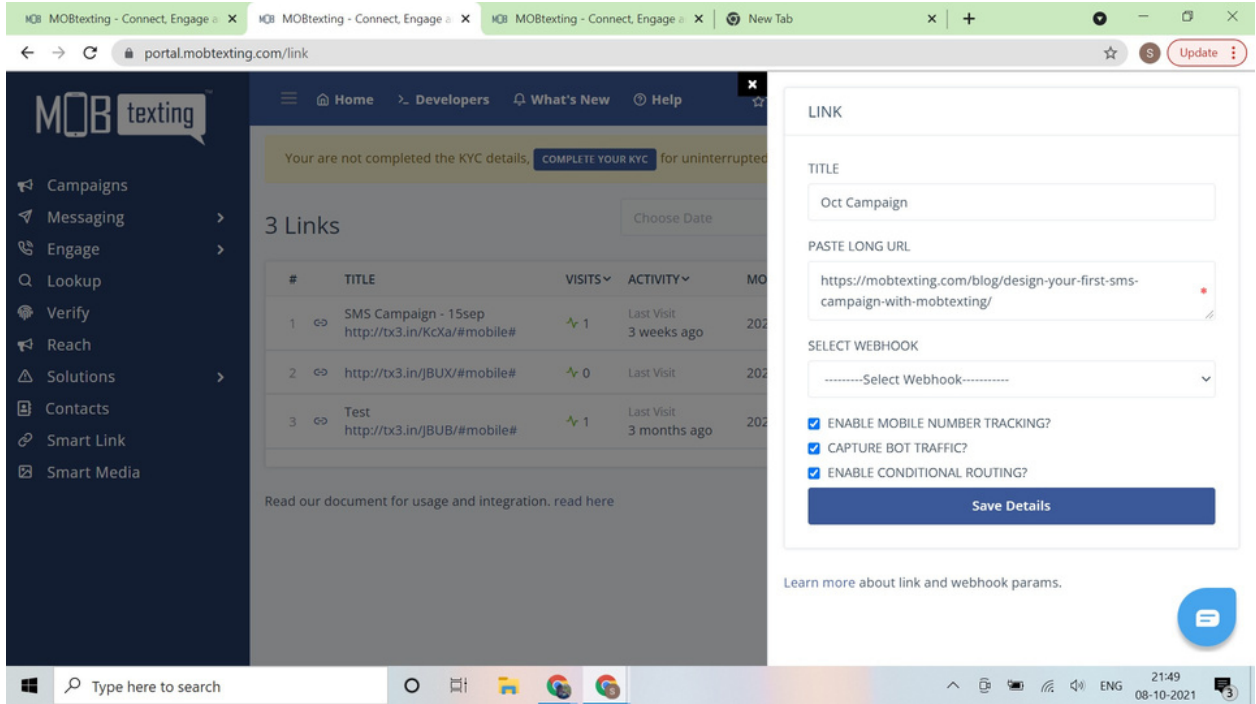
Step1: Click on Smart Link from the menu bar.



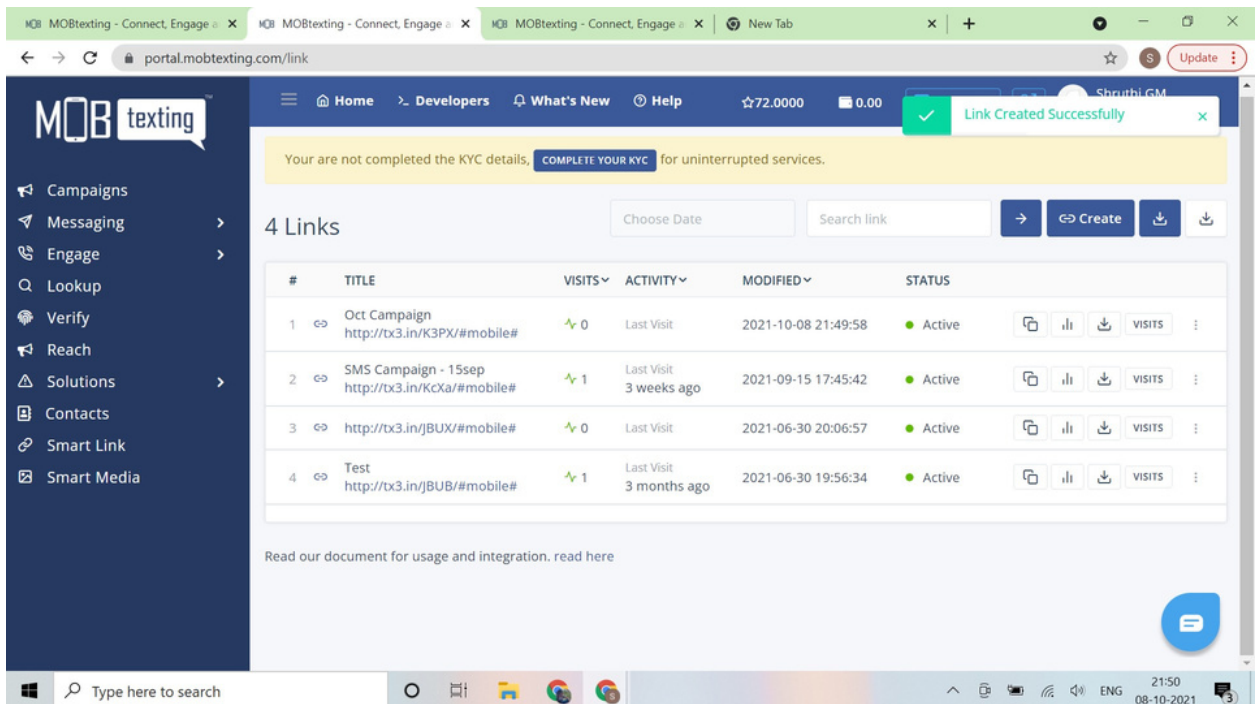
Step2: Click "Create".



Step3: Fill in all the mandatory fields like Title, Paste long URL and select which parameters you need to track.



Step4: Once you save the details, the link will be generated, which you can use for SMS Campaigns.



Manage Smart Link:

To manage your URLs follow the steps below:

Step 1: To edit your URL's click on the Edit icon on the right-hand side of the page. Modify your details and hit the Save button

Step 2: To view your URL's customers click logs then click on the Logs icon against any Smart Link and you will be redirected to a detailed summary page.

The following fields will be shown under Reports:

- Browser: Browser from which user opened your URL
- Device Type: Device from which user opened your URL
- Device Brand: From which device brand user has clicked
- Platform: Customer device Operating System
- Host: From which source, the user has clicked on your URL (Example: Could be the social media handle where you hosted this URL)
- Mobile: Recipient mobile number(s) who clicked on your URL
- IP Address: Customer IP address
- City: To which city the IP address belongs to

Step 3: To view the analytics of any Smart Link URL, click on the Analytics icon against the URL row. You will be redirected to a graphical analytics page where you can view the Smart Link URL.

The following are the parameters based on which the user can view the reports:

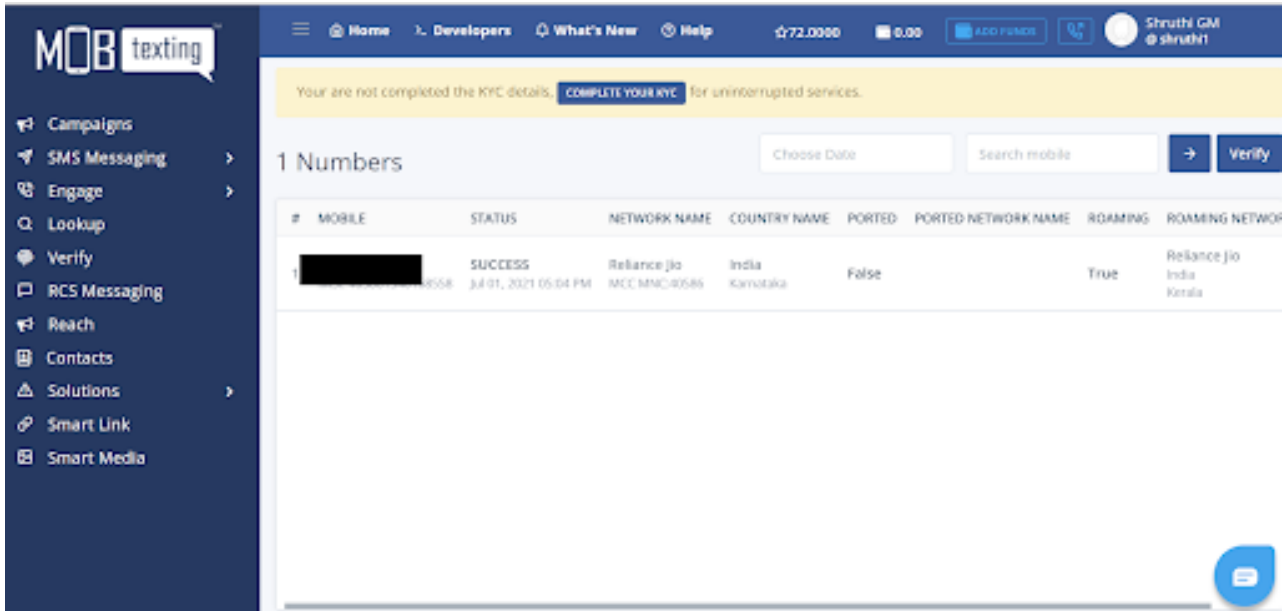
- Daily Traffic: You may check the daily traffic for your URL
- Browser wise: You may check from which browsers, users have opened your URL
- Device wise: You may check from which devices, users have opened your URL
- Region-Wise: You may check from which regions customers have clicked URLs; based on user IP Address

## 11. Lookup for HLR information

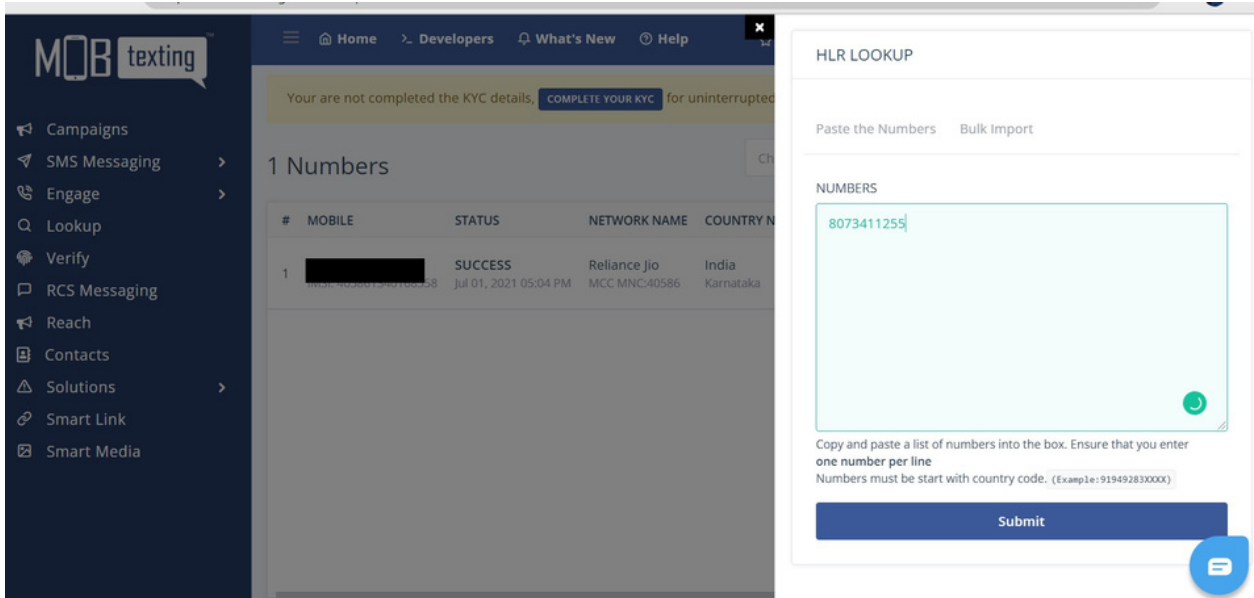
'Lookup' is a smart tool that will initiate a thorough HLR lookup for any mobile number(s). Get to know the portable status of the number, mobile network operator, active status, roaming, and other details. With HLR Lookup you can clean your data lists, or check the status of a phone before sending an SMS.

Follow these simple steps to validate your user mobile number:

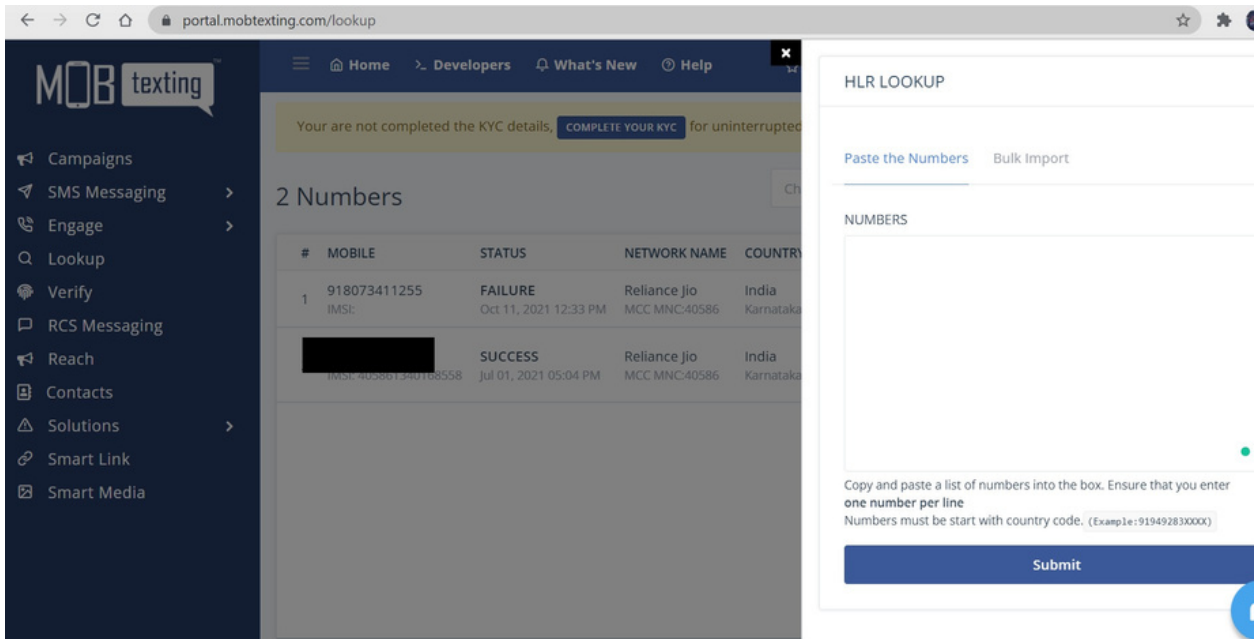
Step1: Click 'Lookup' on the Menu Bar.



Step2: Click on Verify on the left side. Either enter the mobile number(s) manually in the box or just upload a file containing the mobile number for which you want to look for HLR information.



Step3: Click on the Submit button to do the lookup.



Step4: Now view your report. This will give you a detailed summary of HLR information for any number lookup.

Step5: You may filter Lookup reports based on number and Date Ranges. Also, you can download the Lookup report.

The following information will be tracked for every number lookup:

Field Name
Number Status - {Active-Success}{Inactive-Failure}
Network Name
Country Name
Ported. Whether number has been ported or not
Ported Network Name
Roaming? Whether number is in roaming or not
Roaming Network

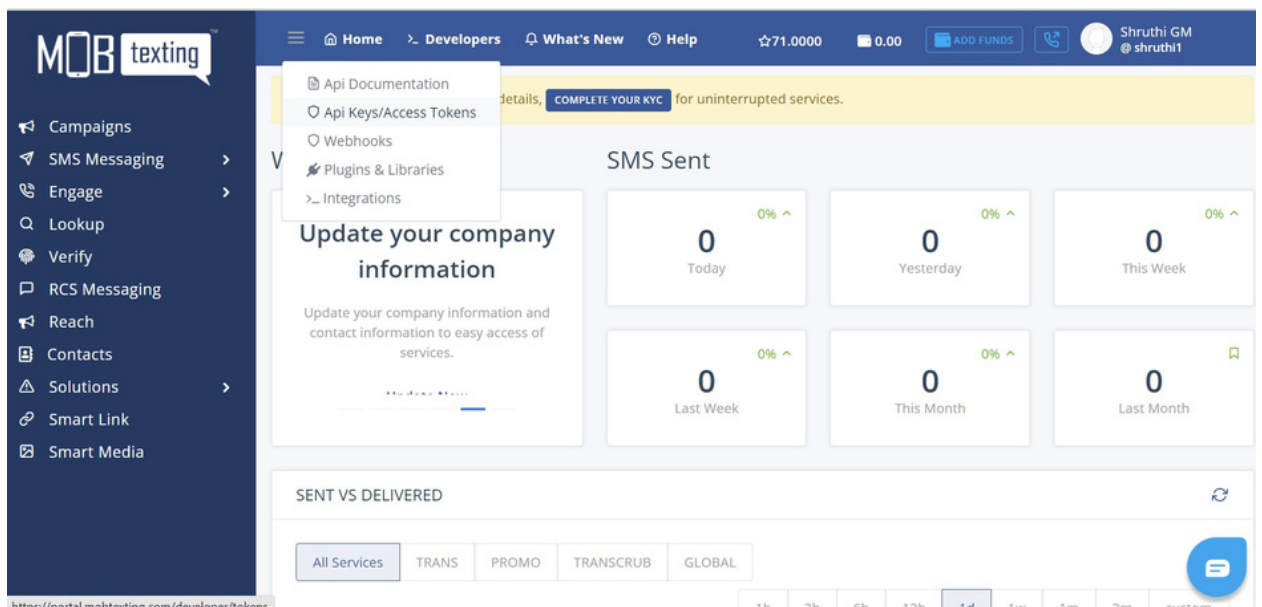
## 12. Developer

If businesses want to integrate our services through API, we're up for it. An API code is provided on your request to aid the integration of the code on your own platform. A detailed API Guide is available under API Documentation to assist you while using your API key.

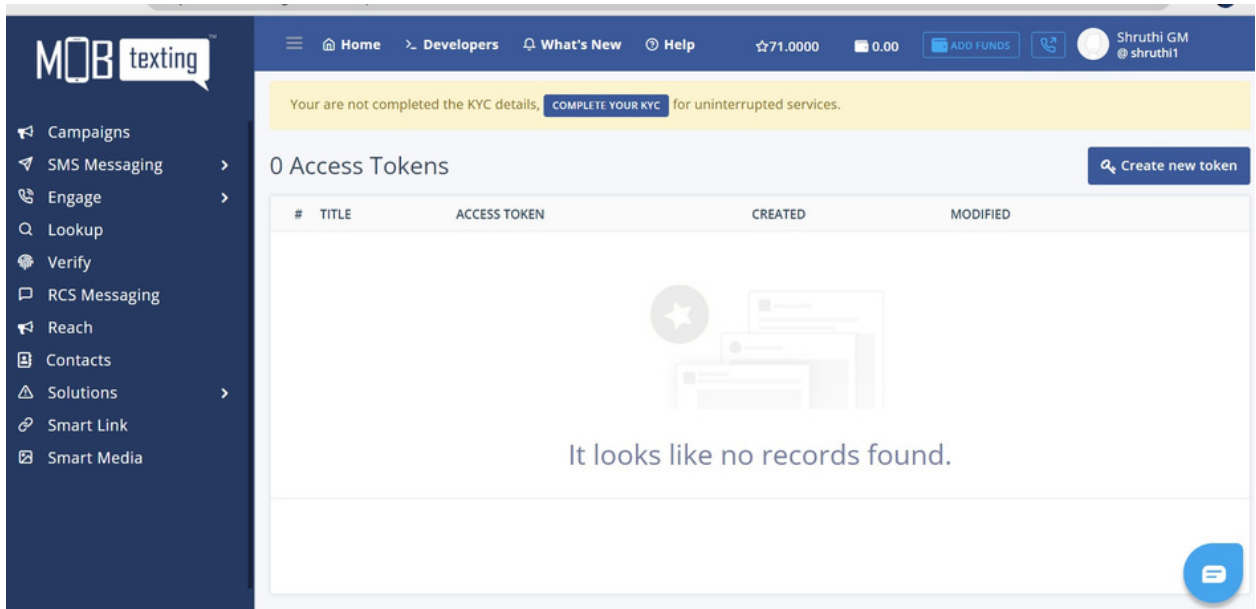
API Keys:

To add in your own API just follow the steps below:

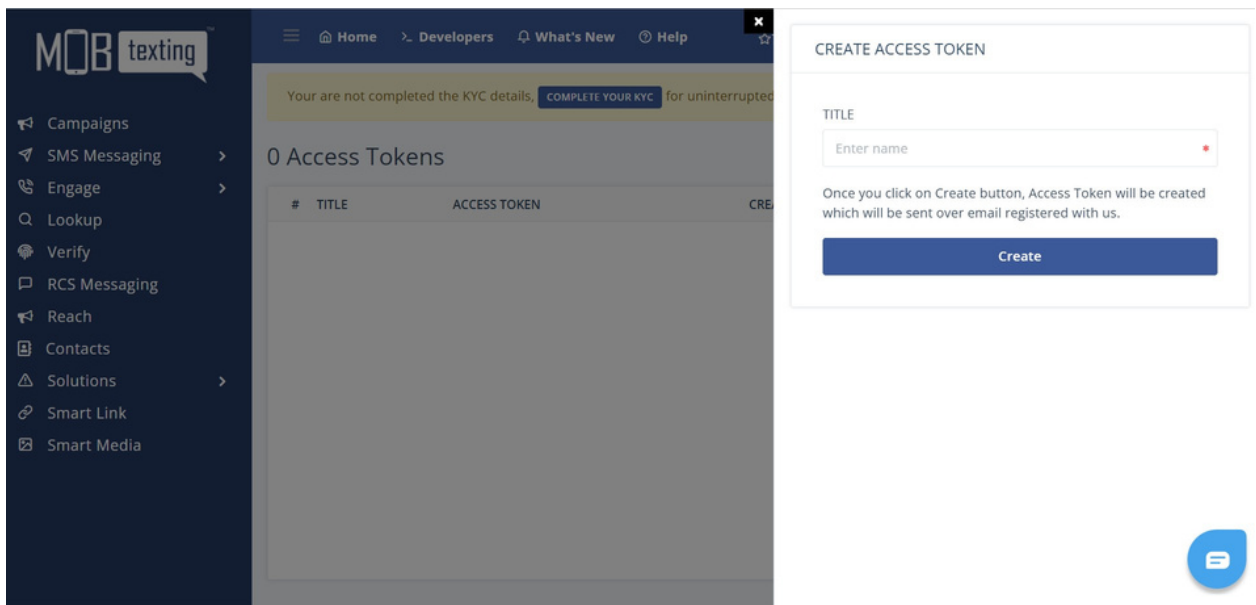
Step1: Click Developer on the top of the screen.



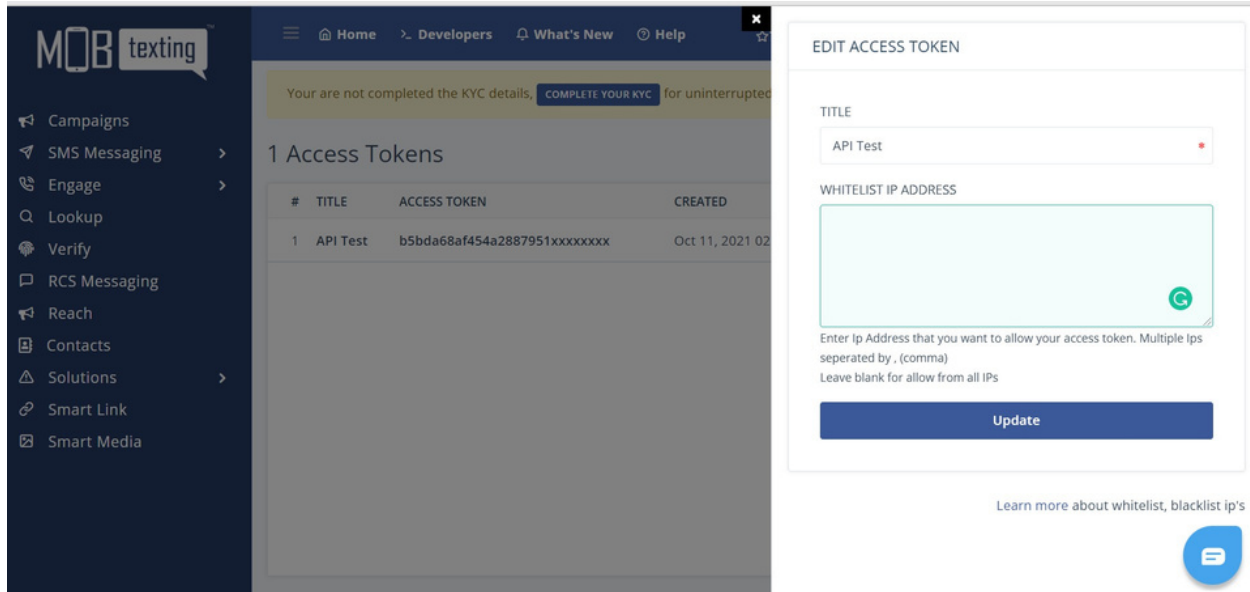
Step2: Select API Keys/Access Tokens to generate your API Key.



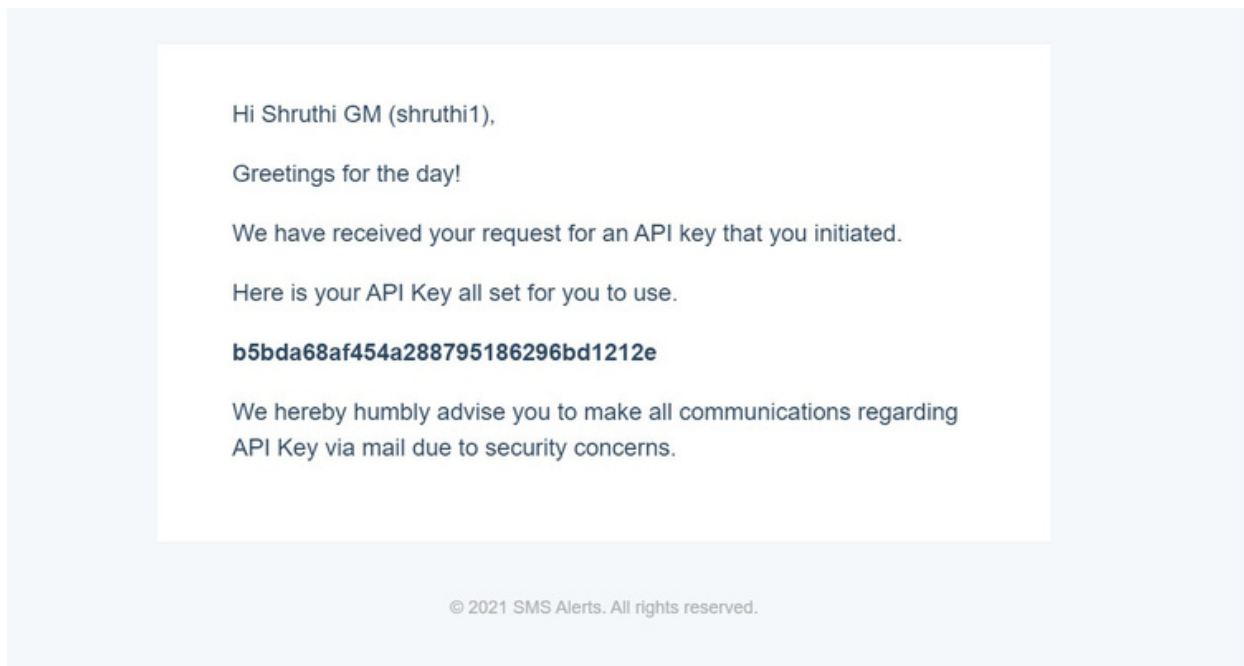
Step3: Click 'Create New Token'.



Step4: Give a name for the token which you're about to create. For example, I named it 'API Test'.



Step5: The API key will be sent over an email within 10 seconds.



## 13. Plugins

To use third-party integrations, we've enabled plugins to seamlessly connect on your platform. Plugins enable you to use our functionality that's embedded in your system architecture.



The following are the plugins that are provided by us:

1. Magento
2. WordPress Plugin
3. Excel Plugin
4. WooCommerce
5. Opencart
6. Odoo
7. V-Tiger
8. Suite-CRM

CRM's:

1. Zendesk
2. Freshdesk
3. Zoho
4. Zoho Desk
5. Hubspot Card
6. Freshservice
7. Hubspot
8. Leadsquared
9. Intercom
10. Sendinblue
11. Apptivo
12. Insightly
13. Agile
14. Freshsales

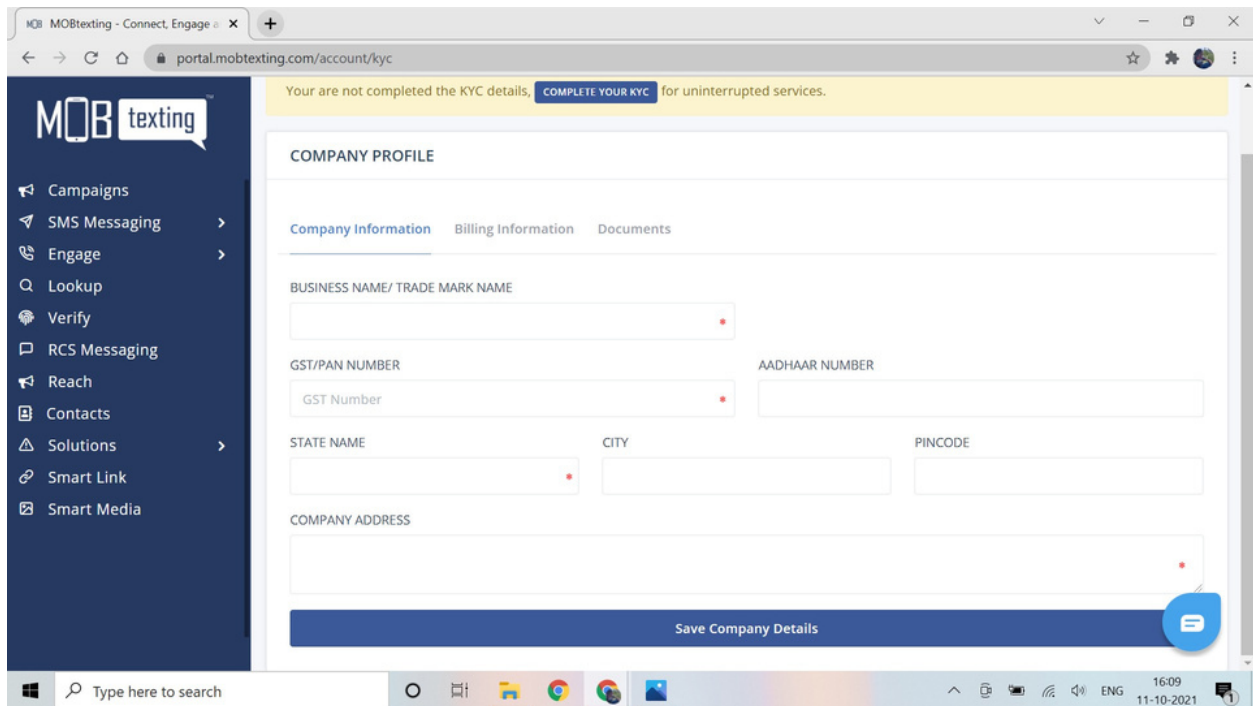
## 14. Account Settings

Setting up an account is important before you start using our Communication Platform. To personalize or modify your account settings, you can set them through this feature.

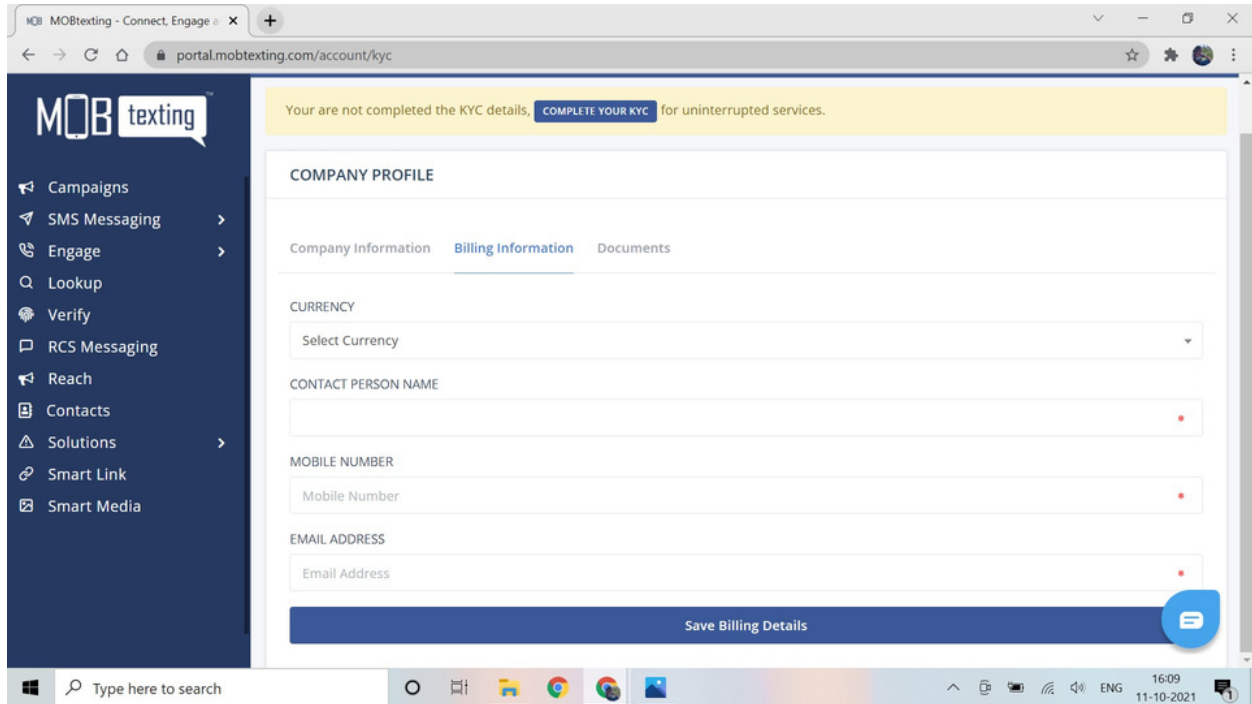
**Profile:** Profile settings include your details such as Name, Email-ID, Mobile Number, Password. You can quickly edit and save these settings.

**KYC Details:**

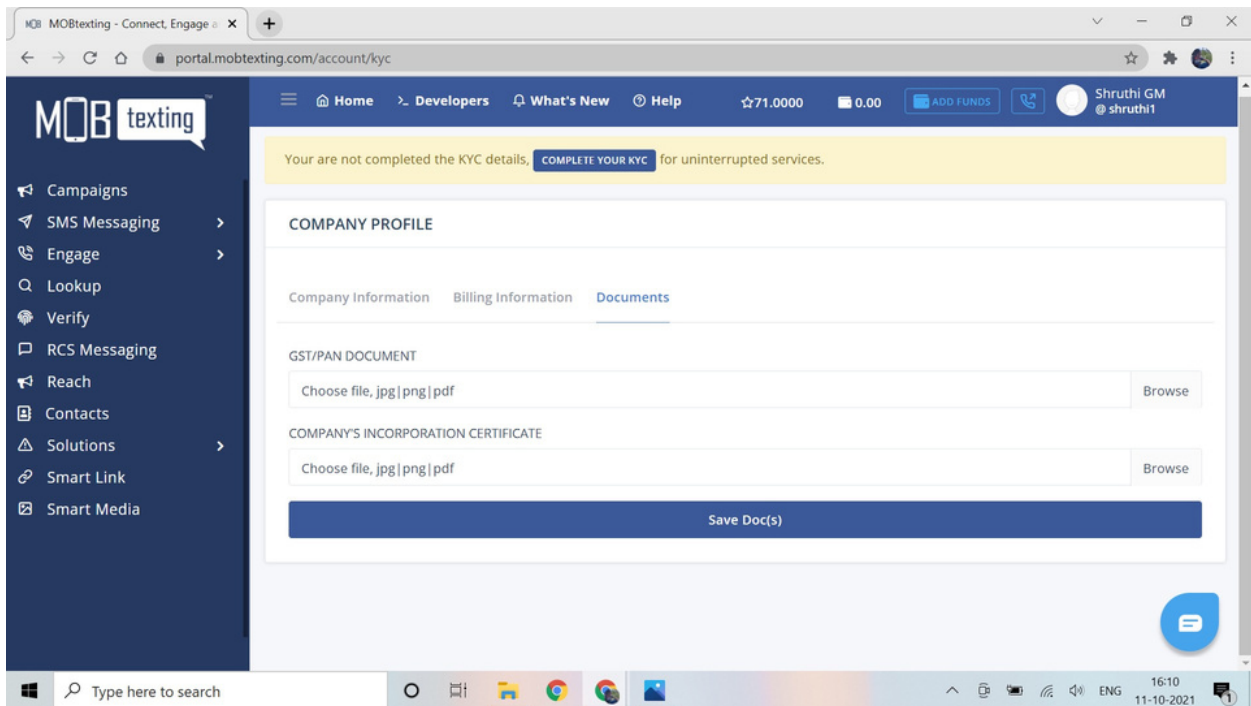
**Company Information:** Enter the mandatory fields like Business name, GST/PAN, State, City, Pin Code & Company Address.



**Billing Information:** Select the currency whether it's the Rupee or Euro.



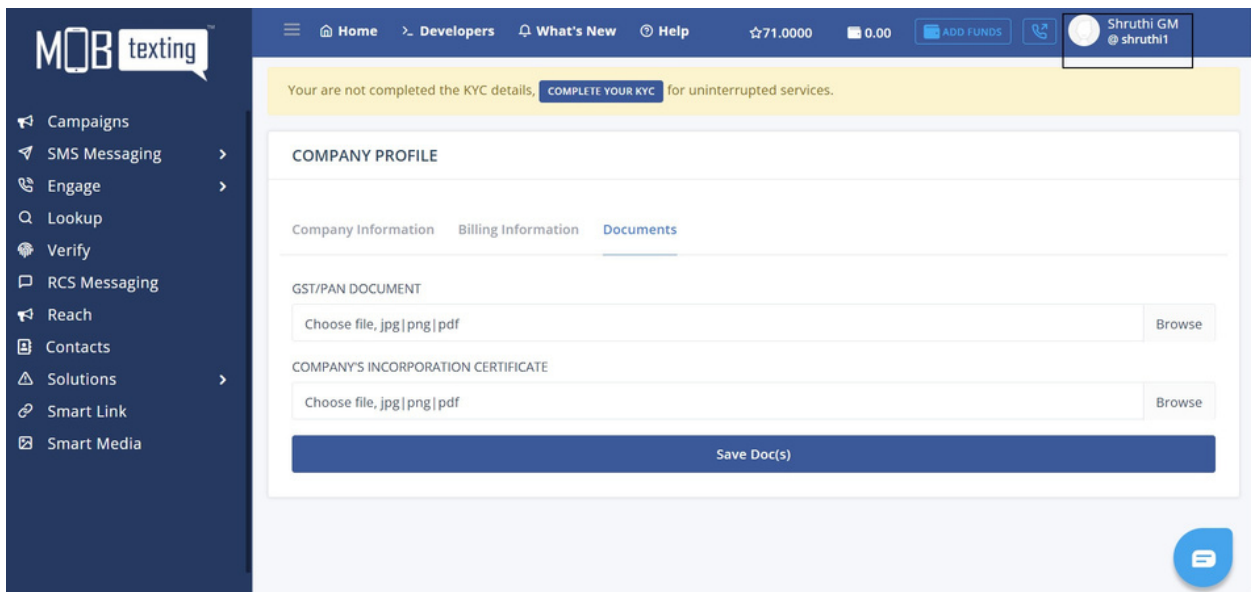
Documents: Upload GST Company incorporation certificate.



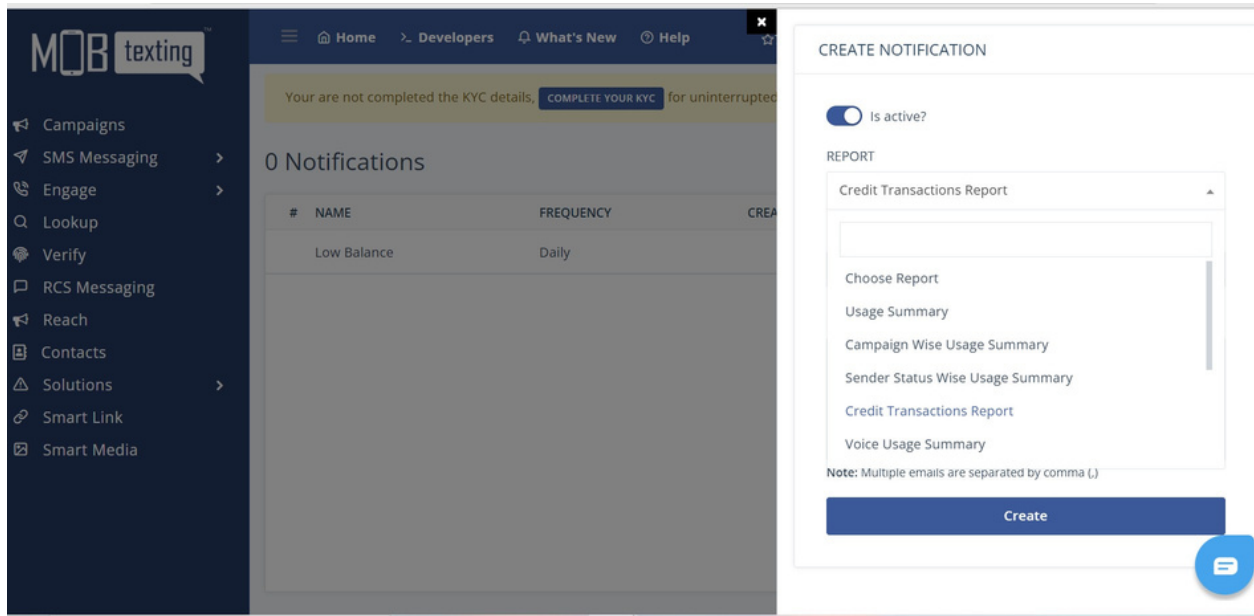
## 15. Notification Settings

This feature allows you to set alerts to notify you of credit usage and to generate a daily usage report. You have a choice to set and prioritize your notification alerts. To set an alert, follow the steps below:

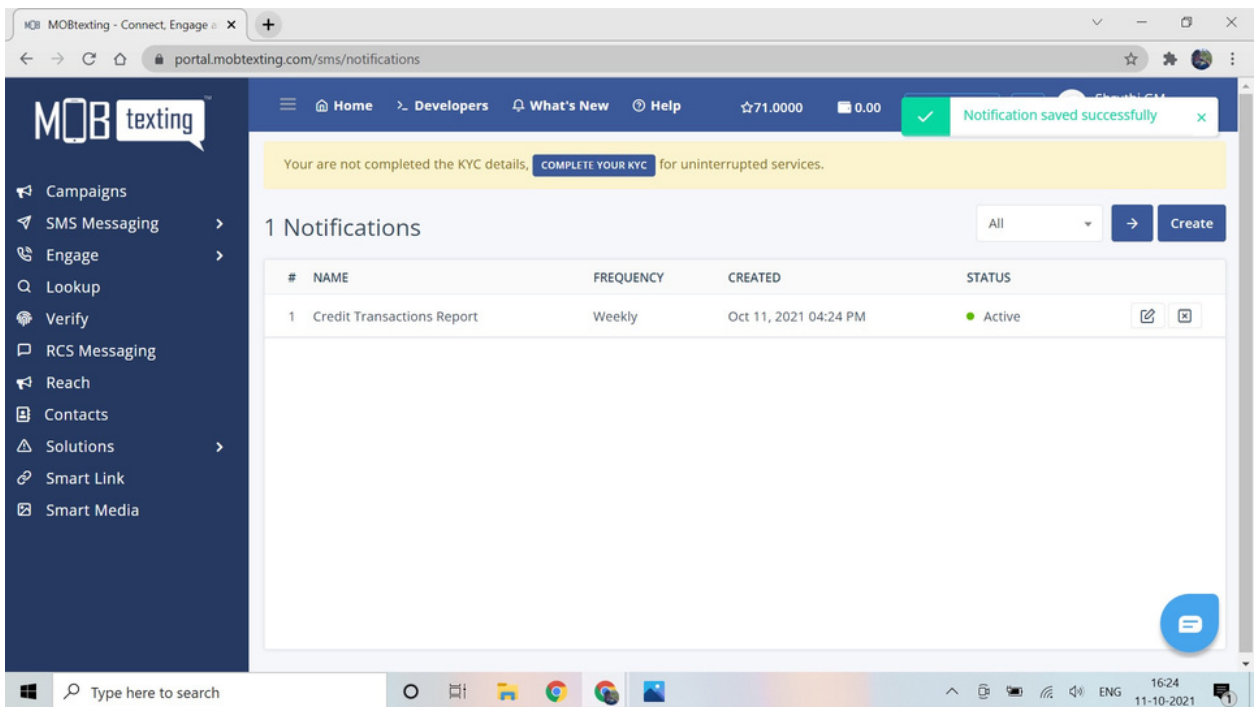
Step1: Select Notifications and click on Create.



Step2: You can choose from the existing type of alerts like Campaign Wise Usage Summary or Voice Usage Summary, etc. Select Frequency like Daily, Weekly, & Monthly. Paste the email-id for which you need to send the alerts.

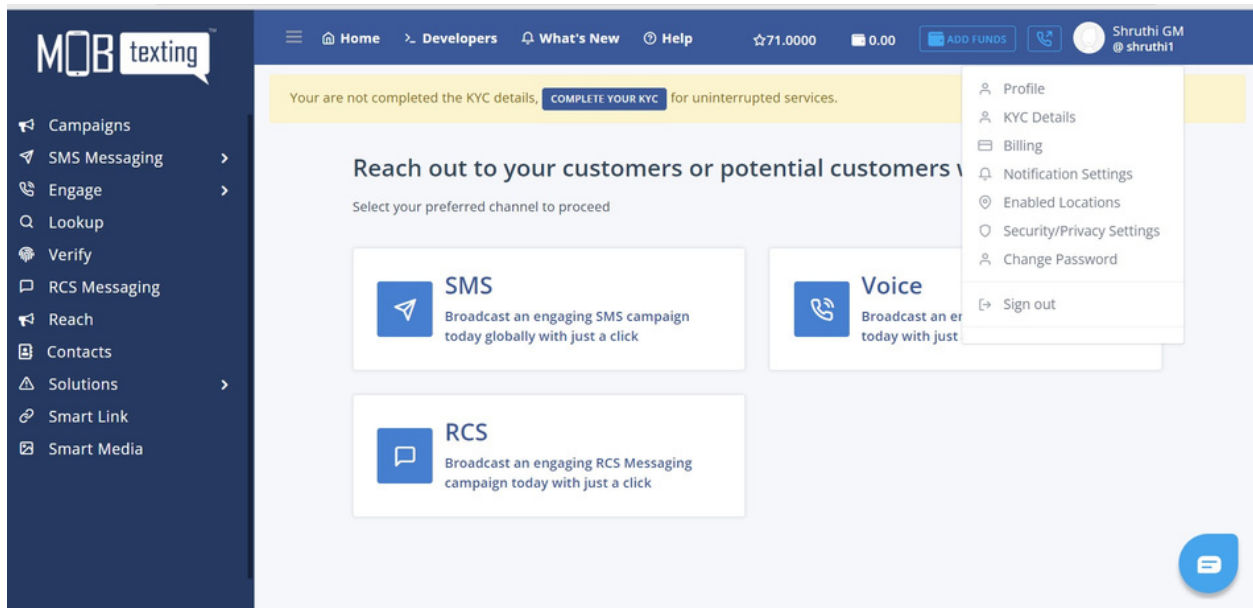


Step3: You can edit these alerts at any time according to your requirement.



## 16. Signing Out

To log out, click on the Sign Out option in the right menu of the account settings.



## 17. MOBtexting SMS API Documentation



<https://portal.mobtexting.com/docs/v2/sms>