Textmaxx PRO

WELCOME
TO THE FAMILY

WELCOME TO TEXTMAXX PRO

As the Director of Sales & Operations of Textmaxx Pro, I want to personally thank and welcome you to our company.

We are excited to assist you in achieving your text marketing and communication goals through using our TCPA-compliant, personalized, automated communications suite that reaches today's customer exactly how they want: real-time - via text message - instantly to their mobile phone.

The core of our business is to help companies be responsive, and deliver useful information across multiple platforms - including web and mobile - by connecting you directly to your customers.

It is important to us to take the time and greet our new clients, and we want to encourage you to connect with our support team with any questions as they should arise.

At Textmaxx Pro, we strive for excellence in meeting all of your service needs. Anything less is not good enough. This means that every call you make to us, you will receive a live person to assist with your question. We hope to earn your confidence and your continued business.

We look forward to our partnership with you!

Sincerely,

Paul Johnson
Director of Sales and Operations, Textmaxx Pro

CLIENT CONTACT INFORMATION

Textmaxx Pro Hours:

Monday - Thursday
8:30am — 5:30pm EST

Friday
8:30am — 5:00pm EST

Customer Support:

📞 866-367-6889 (Call or Text)

✉️ helpdesk@textmaxxpro.com

🖨️ 941-378-2522

Text "TMPSUPPORT" to 95000 to receive notifications & alerts

Address:
2601 Cattlemen Rd. Ste 200
Sarasota, FL 34232

Website:
www.Textmaxxpro.com

QUICK START GUIDE

WATCH THE TRAINING VIDEOS HERE

ACTIVATE YOUR ACCOUNT!
Use the credentials provided by our team and log in. From here you can create user credentials for your employees to log in as well.

START BY GATHERING YOUR CUSTOMER LISTS FOR AN UPLOAD.
Textmaxx Pro requires at the minimum your customer's cell phone and contact name.
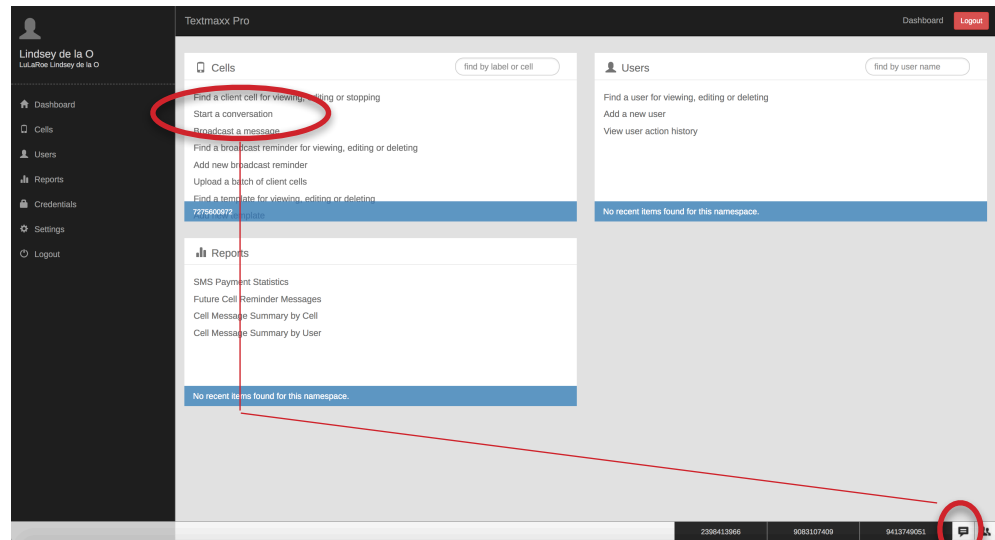
How to Initiate a Two-Way Conversation:

STEP 1:

Click the **"Start a Conversation"** link in the "*Textmaxx Pro*" section of the Home Page

or

Click on the **text message icon** at the bottom right-hand side of your screen

STEP 2:

Enter the cell phone number you wish to text and **click "Start"**

Hi, lets start a conversation...

7564341875

cancel   Start

Create the **"LABEL".** This is how you will identify your customers. Most Textmaxx Pro users list the customer's *FULL NAME* as the "*LABEL*"

We're almost done!
Lets ask them if it's okay to communicate via sms

Mary Smith

Example: "Audrey Acme #1234"

Select the preferred language for the customer
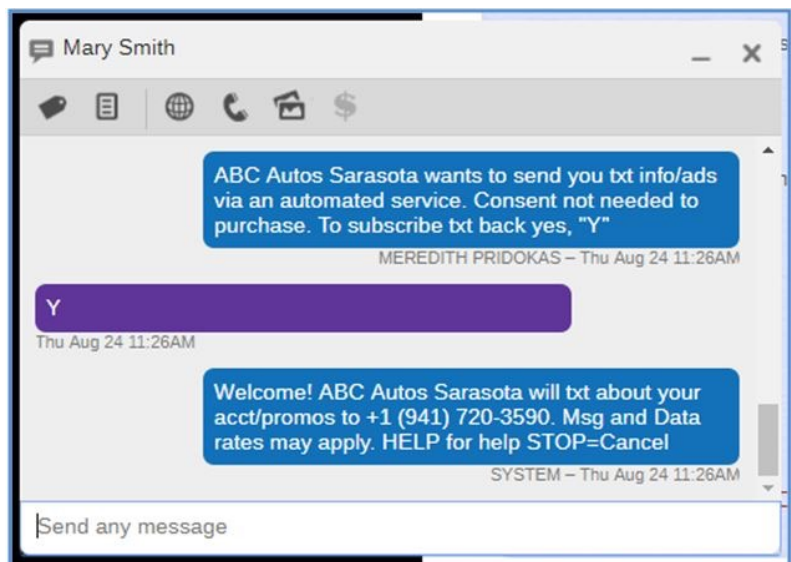
prefers English language ▼

Select if you will be texting this customer for **"Promotions"**, **"Account"**, or **"Both"**

⦿ Promo Only   ◯ Account Only   ◯ Both

Click "**Ask Permission**"

cancel   Ask Permission

STEP 3:

Once your customer responds to the initial opt-in message you are now able to text via the 2-way chat box, send text reminders and broadcast messages

💬 Mary Smith   — ✕

🏷 📄 🌐 📞 🎁 💲

ABC Autos Sarasota wants to send you txt info/ads via an automated service. Consent not needed to purchase. To subscribe txt back yes, "Y"

MEREDITH PRIDOKAS – Thu Aug 24 11:26AM

Y

Thu Aug 24 11:26AM

Welcome! ABC Autos Sarasota will txt about your acct/promos to +1 (941) 720-3590. Msg and Data rates may apply. HELP for help STOP=Cancel

SYSTEM – Thu Aug 24 11:26AM

Send any message

How to Upload Customers Into Textmaxx

STEP 1:

- **Download our [upload template](#)** and compile the CSV file with your customer information
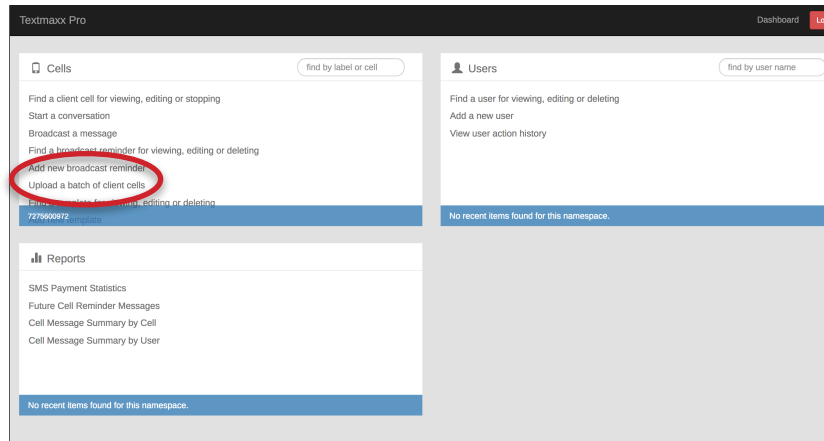- Once your CSV file is updated with the customer information, save the file to your computer

STEP 2:

From the "*Home Page*"
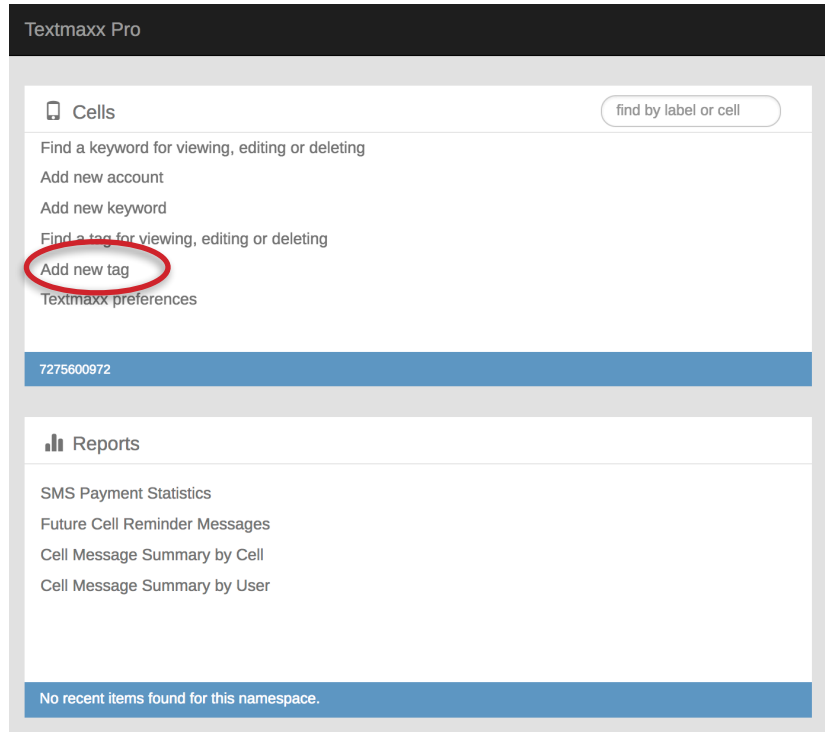**click on "*Upload a batch of client cells*"**

SELECT :

1. The text message type (*Account, Promotional, or both*)

2. Opt-in choice: send your texts with "*Auto Opt in Consent*" (Opt-in text message will automatically send) or "*None*" (no text message will go out; the Textmaxx Pro customer profile is simply updated with this customer information)

3. If you are sending an opt-in consent text, select the SMS # you wish to send the text from (*this is only for customers who have multiple SMS#s with Textmaxx Pro*)

4. Click "*Choose File*" and select the CSV file to upload from your computer

5. If you utilize the Tag Feature, select a tag to group these customers

6. Enter a email address to receive upload notifications

7. Select "*Upload Cells*"

Textmaxx Pro — Dashboard

Cells — find by label or cell
Find a client cell for viewing, editing or stopping
Start a conversation
Broadcast a message
Find a broadcast reminder for viewing, editing or deleting
Add new broadcast reminder
Upload a batch of client cells
7275600972

Reports
SMS Payment Statistics
Future Cell Reminder Messages
Cell Message Summary by Cell
Cell Message Summary by User

No recent items found for this namespace.

Users — find by user name
Find a user for viewing, editing or deleting
Add a new user
View user action history

No recent items found for this namespace.

Upload a batch of client cells
LuLaRoe Lindsey de la O

What type of texts will you send to these uploaded cell numbers?
- Account only
- Promo only
- Both (account & promo)

If you select to use the Auto Opt-in feature, the system will automatically push out an Opt-in text to each cell number. Each auto message sent will count as part of your monthly package. By selecting "None" no auto consent message will be sent and your customer information will be updated.

- Upload cell phone information and send Auto Opt In Consent
- None (no auto opt-in sent) update customer info only

Send auto opt-in from   +1 (941) 200-3632 — default

File type must be .csv or .txt. Download the user guide for more information.   Choose File   No file chosen

Tag Management

Append these tags to the uploaded cells   ☐ CLEVER ☐ FB Group VIPS ☐ Tax Free Weekend ☐ TEST TAG
☐ Collections ☐ Insurance ☐ Payment ☐ Promos ☐ Special Occasions

☐ Clear out the selected tags from all cells not in the upload file?

Notification Recipients (use a comma to separate email addresses)

Send upload results to these recipients   Sarah@abcauto.com

cancel   Upload Cells

Tags: What is a Tag and How to Use Tags

A **Tag** is a way to group or categorize multiple customers in Textmaxx Pro. Users can send bulk texts to a particular **Tag** group at once instead of sending out individual texts.

To create a new Tag click on "**Add New Tag**" on the Home Screen

Textmaxx Pro

📱 Cells   find by label or cell

Find a keyword for viewing, editing or deleting
Add new account
Add new keyword
Find a tag for viewing, editing or deleting
Add new tag
Textmaxx preferences

7275600972

📊 Reports

SMS Payment Statistics
Future Cell Reminder Messages
Cell Message Summary by Cell
Cell Message Summary by User

No recent items found for this namespace.

Enter the name of the Tag (Example: June Birthdays, August Anniversary, 1 week Past Due, etc.). Click **"Create Tag"** to save.

New Tag
LuLaRoe Lindsey de la O

Tag

cancel   Save

To view, edit or delete a Tag, click on the "**Find a tag for viewing, editing to deleting"** from the Home Screen.
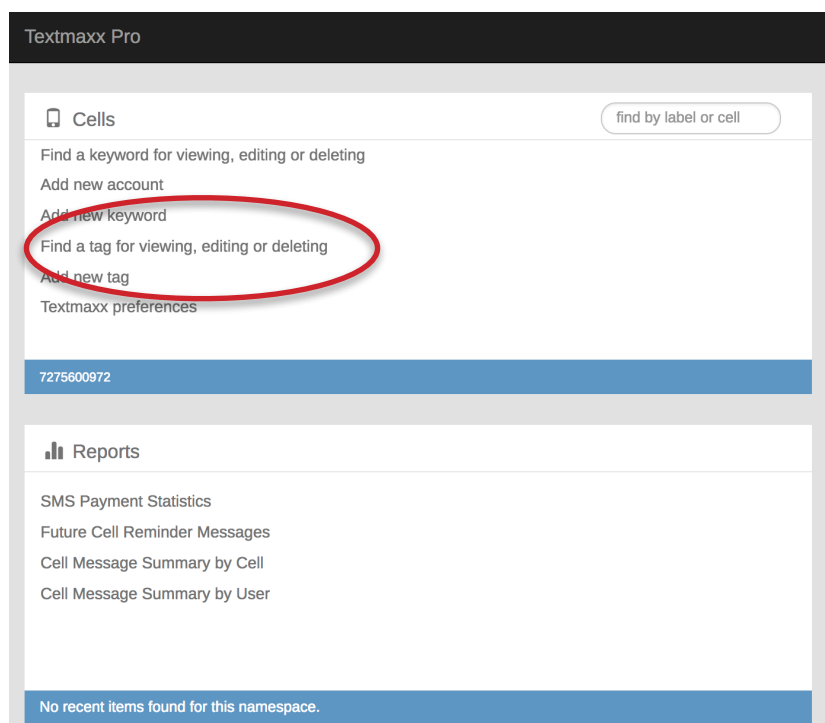
Choose the Tag you wish to edit or delete from the list (Note: Some accounts are created with Tags that may not be edited or deleted.)

Textmaxx Pro

📱 Cells   find by label or cell

Find a keyword for viewing, editing or deleting
Add new account
Add new keyword
Find a tag for viewing, editing or deleting
Add new tag
Textmaxx preferences

7275600972

📊 Reports

SMS Payment Statistics
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No recent items found for this namespace.

You can individually Tag customers inside their cell card by selecting the Tag(s) at the bottom of the card and clicking **"Update Client**
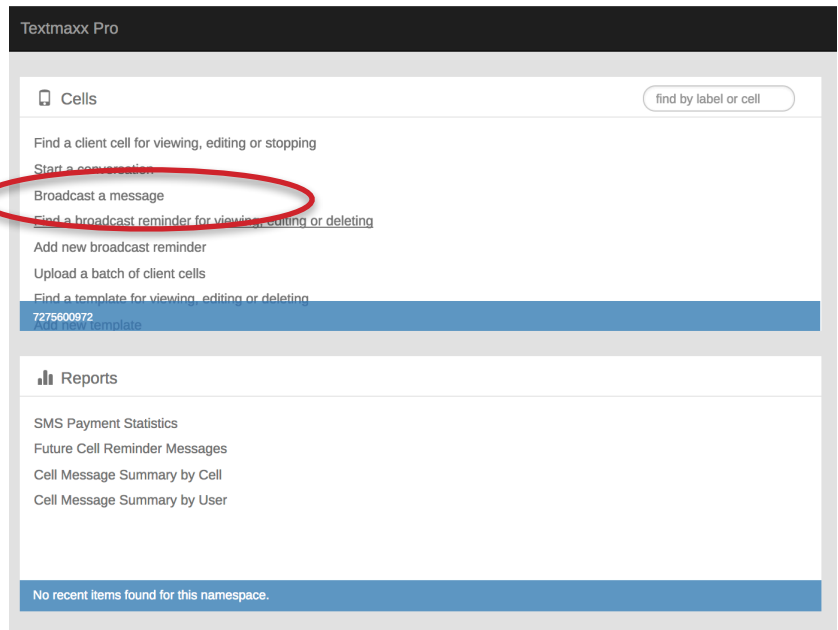
Textmaxx Pro

📱 Cells   find by label or cell

Find a client cell for viewing, editing or stopping
Start a conversation
Broadcast a message
Find a broadcast reminder for viewing, editing or deleting
Add new broadcast reminder
Upload a batch of client cells
Find a template for viewing, editing or deleting

Modify Cell Phone   ⚙▾
LuLaRoe Lindsey de la O

Label	2398413966
Cell (include area code)	+1 (239) 841-3966
Account Number	
Birth Month & Day	Not used ▾ Not used ▾
Language Preference	English ▾
Employee Administrator	Not used ▾
Accepts promo/discount messages?	Yes
Accepted promo messages on	Fri, Nov 17, 2017 07:31 PM
Last marketed on	N/A
Accepts account messages?	No
Accepted account messages on	N/A

Last sent	Fri, Dec 15, 2017 12:29 PM
Last received	Fri, Nov 17, 2017 07:31 PM
☑ Does not need a response?	
Distribution Groups (tags)	☐ CLEVER ☐ FB Group VIPS ☑ Tax Free Weekend ☐ TEST TAG ☐ Collections ☐ Insurance ☐ Payment ☐ Promos ☐ Special Occasions

cancel   **Save**

Broadcasting: How to Send Group Text Messages

The **Broadcasting feature** is used to send out a text message to your entire client base or a Tag (distribution group) of

Textmaxx Pro

📱 Cells   find by label or cell

Find a client cell for viewing, editing or stopping
Start a conversation
Broadcast a message
Find a broadcast reminder for viewing, editing or deleting
Add new broadcast reminder
Upload a batch of client cells
Find a template for viewing, editing or deleting
7275600972
Add new template

From the Home Screen click on **"Broadcast a message"**

📊 Reports

SMS Payment Statistics
Future Cell Reminder Messages
Cell Message Summary by Cell
Cell Message Summary by User

No recent items found for this namespace.

Broadcast a message
LuLaRoe Lindsey de la O

Broadcast to cells opted in for	Marketing-related messages
Include cells using language	English
Start with a template (optional)	Pick a template
Text Message contents	
132/132 characters left.	
Automated message footer	"STOP to stop, HELP for help"
Send broadcast from	+1 (941) 200-3632 — default
Only broadcast to cells in these distribution groups (leave them unchecked for ALL)	☐ CLEVER ☐ FB Group VIPS ☐ Tax Free Weekend ☐ TEST TAG ☐ Collections ☐ Insurance ☐ Payment ☐ Promos ☐ Special Occasions

Notification Recipients (use a comma to separate email addresses)

Send broadcast results to these recipients	lindsey@nickelcommunications.com

cancel   **Broadcast message**
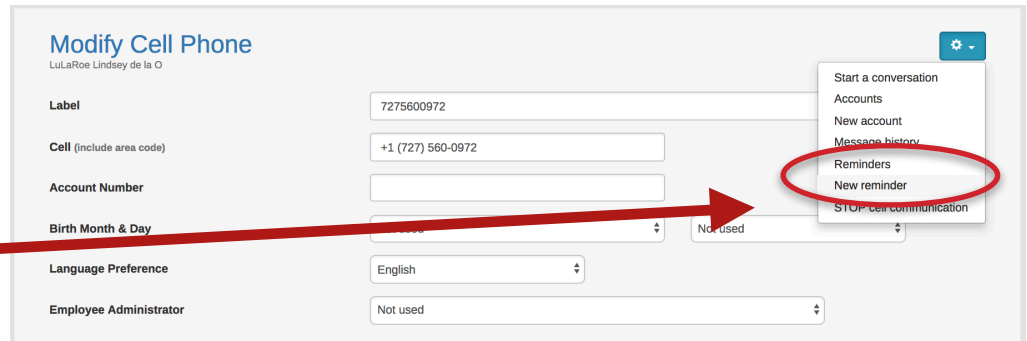
1 - Select from the drop-down if the broadcast message is intended for recipients opted in for Account or Marketing-related messages

2 - Select if these cells were listed as English or Spanish at the time of initial upload

3 - Select a template or you can compose a custom message in the text box

4 - If you are using a template, you can edit the text here or compose your custom message

5 - Select the tag or tags you wish this broadcast text to be sent to. **IMPORTANT: IF NO TAG IS SELECTED THIS BROADCAST WILL BE SENT TO EVERY CUSTOMER WHO IS OPTED IN TO RECEIVE TEXTS**

6 - List the email address you wish the broadcast results to be sent to

Click **"Broadcast message"** to send the text blast to the selected customer base
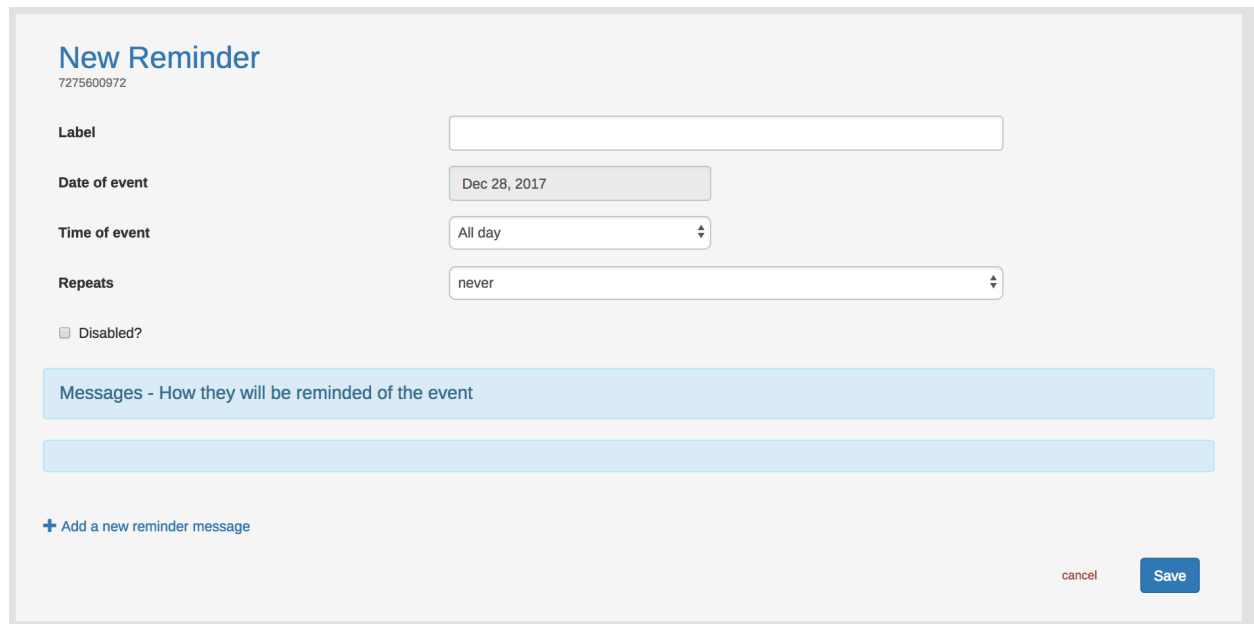
Reminders can be set up on an individual basis or in a group broadcasted message. Reminders are automatically sent out to your customer(s) and used for various communications (recurring events, scheduled payments, etc.)

In the Modify Cell Phone Window **click on gear icon** and choose New Reminder

1 - Label the reminder (Example: Payment Due Reminder, Past Due Reminder, Recurring Event Reminder)

2 - Set the date & time of the "event"

3 - Set how often this "event" repeats

4 - Set the expiration date of event (the date you select here will be the last date the customer receives this reminder text)

5 - Select from the drop down the time the text should go out as it corresponds to the date & time of the "event" you selected in #2
Next compose the text message. Note: Right-click to see a list of pre-populated customer information you may include in the text.

6 - Click "Create Reminder" to save

How to Broadcast a Reminder

Broadcasting a Reminder: Set a Reminder to Broadcast to a Tag (distribution group) of customers.

Click on "**Add a new broadcast reminder**" from the Home Page
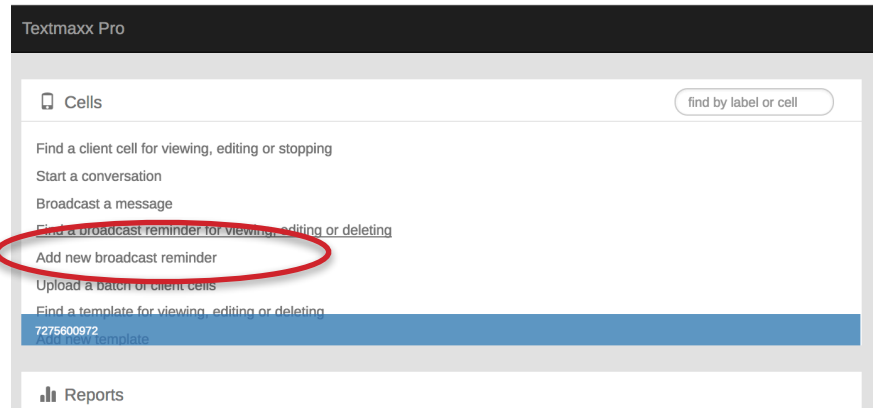
Textmaxx Pro

📱 Cells   find by label or cell

Find a client cell for viewing, editing or stopping
Start a conversation
Broadcast a message
Find a broadcast reminder for viewing, editing or deleting
Add new broadcast reminder
Upload a batch of client cells
Find a template for viewing, editing or deleting
7275600972
Add new template

📊 Reports

1 - Label the reminder (Example: Payment Due Reminder, Past Due Reminder, Recurring Event Reminder)
2 - Set the date & time of the "event"
3 - Set how often this "event" repeats
4 - Set the expiration date of "event" (the date you select here will be the last date the customers receive this reminder text)
5 - Select from the drop down if this text will go to cells opted in for Account for Promo messages
6 - Select if these cells were listed as English or Spanish at the time of upload
7 - Select the tag or tags you wish this broadcast text to be sent to. **IMPORTANT: IF NO TAG IS SELECTED THIS BROADCAST WILL BE SENT TO EVERY CUSTOMER WHO IS OPTED IN TO RECEIVE TEXTS**
9 - Compose the text message
10 - List the email address you wish the broadcast reminder results to be sent to
11 - Click "Create Reminder" to save

New Broadcast Reminder
LuLaRoe Lindsey de la O

Label	
Date of event	Dec 28, 2017
Time of event	All day
Repeats	never
Remind those cells opted in for	Account-related messages
Remind cells using language	English

Only remind the cells in these distribution groups (leave them unchecked for ALL)

☐ CLEVER   ☐ FB Group VIPS   ☐ Tax Free Weekend   ☐ TEST TAG
☐ Collections   ☐ Insurance   ☐ Payment   ☐ Promos   ☐ Special Occasions

☐ Disabled?

Messages - How they will be reminded of the event

✚ Add a new reminder message

Notification Recipients (use a comma to separate email addresses)

Send broadcast reminder results to these recipients   lindsey@nickelcommunications.com

cancel   Save