



SMS PLUG-IN FOR MICROSOFT® EXCEL®

DIRECT MESSAGING SOFTWARE FOR MICROSOFT® EXCEL®: 2003 | 2007 | 2010

User Guide

A video tutorial for installing and using the Excel® Plugin is available at www.pageone.co.uk/excel

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About the Excel Plugin

PageOne's Excel Plugin makes it easy to send bulk or personalised messages to multiple people simultaneously. It can be a powerful, yet simple and easy to use marketing communications tool. Customer data held in document formats that can be opened in Excel (xls, csv, txt) can be used to create mailing lists for the sending of SMS. You can also schedule messages for sending at a point in the future or use customer data with custom message templates to create personalised communications.

Installation

Download the installer from the PageOne website at www.pageone.co.uk/excel then run the installer to install the Excel Plugin for 2003, 2007, 2010 versions of Microsoft Excel.

Note: Versions of Office earlier than 2003

Please contact PageOne Customer Support if you require a plugin for earlier versions of Microsoft Excel.

Note: Multiple Users

By default, the excel plugin will install on to a single user account – for use only by the user currently logged on to the computer. If you would like to install the excel plugin so that all users of a single computer can use the plugin, please contact PageOne for an alternative installer.

Using the plugin

After installation in Microsoft **Excel 2003**, the SMS Toolbar should be visible. If not, go to View > Toolbars from the application menu and select the p1CommandBar to show it in the toolbar.

In **Excel 2007 & 2010**, go to 'Add-Ins' from the ribbon toolbar to view the SMS toolbar.

If the toolbar is still not visible from within Microsoft Excel then the Plugin may not have installed correctly. Uninstall the plugin, restart your computer and then try re-installing the plugin. If you continue to have problems, please contact customersupport@pageone.co.uk

Proxy

If you use a proxy to connect to the internet, you must configure the excel plugin to use it. Click 'Options' from the SMS toolbar and enter your proxy information.

Login

Click 'Login' and when prompted, enter your username and password. After this initial login, you will be automatically logged in each time you start Excel.

Note: Telephone Number formats

The Excel plugin accepts numbers in both the UK and international format: '077xx', '4477xx' or '004477xx'. Excel does not permit numbers that start with a symbol, therefore '+4477xx' formatted numbers are invalid and will not work.

Send Message Wizard

Click 'New Mobile Message' to start the Send Message Wizard. Choose from sending a 'Basic Message', 'Template Message' or a 'Multiple Message'. All message types allow **scheduling of the message** at the next screen; simply tick the box and enter the date and time if you wish to schedule your message for sending at a later date and time.

Note: scheduled messages:

Scheduled messages must be set at a time that is more than 10 minutes into the future.

Basic Message:

Select the cells in the spreadsheet that contain the mobile numbers of the people you wish to send a message. Click 'Next', then enter the text for your message. Click 'Next' again to preview the messages that you are about to send – this will be your last opportunity to make changes to the list or message before they are sent. Click 'next' once more to send the message.

Template Message:

Similar to a mail merge, you can add dynamic fields to a message that will use data from the spreadsheet to create a personalised message for each of your recipients.

Choose to work with an existing template or to create a new template. Select 'Existing Template' and click 'next' to work with a template that already exists in your account (one you made previously with the excel plugin or with a PageOne web account such as Connect).

At the 'Compose a template message' screen, select your template, then click in the 'To:' text entry field and select your desired recipient numbers from the spreadsheet.

After you select your message recipients, the first of the '[unspecified]' dynamic fields will be highlighted automatically. Choose the data in the spreadsheet to automatically fill this field. Similar to a 'Mail Merge', the Excel plugin can use the data on the same row as each recipient number to create a personalised message for each recipient. You can change any of your field selections by clicking to select dynamic field and then reselecting the data from the spreadsheet.

Once you have filled all your fields with data, click 'next' to preview all the messages that are about to be sent – if you need to make any corrections, click 'Back'. Click 'Next' to send the messages.

If you are creating a new message template, select 'New Template' in the wizard, click 'Next' and then type your message. Once the message is written, highlight the areas of the message where you would like to insert data from the spreadsheet. Click 'add field' to add a dynamic field for every part of the message you would like to be personalised with your spreadsheet data. '[unspecified]' will appear in place of the text that will be inserted from the spreadsheet. Click save and give your template a recognisable name (for your reference) and then click 'next' to select your template and continue on as if working with an existing template (see above).

Multiple Message:

Allows a different message to be sent to each recipient. Similar to the Basic Message, you will also be prompted to select a range of messages from the spreadsheet in addition to a list of recipient numbers. Messages should be in the column adjacent to the list of recipient numbers. The message should be on the same row as its intended destination number.

After sending your message(s)..

As the message is sent, the wizard will display the progress screen. Once sending is complete, a status screen displays the messages sent and a status description. At this point, messages that have been sent to PageOne for delivery will be displayed with the status 'Message Queued for delivery'.

You can now close the wizard and check the delivery status of your messages by opening the outbox, or you can run the wizard again to send a new message.

The Outbox & Delivery Reports

The message outbox shows a history of your sent messages along with the status of the message. The view can be altered to show messages sent in the last 24 hours, 7 or 31 days. The status column should show 'Success' upon message delivery.

Replies

You can view inbound messages via the 'Message Inbox' as well as being able to import replies into a spreadsheet. This is done via the 'Import Replies' button. In both situations, you can view or import the last 24 hours, 7 or 31 days worth of replies.

Address Book

You can interchange address book contacts from PageOne web accounts such as Connect, Flare or Contact with the Import and Export wizards. These allow address book data to be edited, updated or cleaned en mass.

Import all the address book data from your account into a spreadsheet by clicking 'Import addresses' and selecting a basic import. Alternatively, the advanced import allows you to define which address book fields you would like to import.

Exporting addresses allows you to upload addresses to your account. You can upload by column or by range.

When uploading by column, you will need to assign the appropriate columns containing your address book data to the address book fields listed by the uploader. Uploading by range is similar, however specific sections (ranges) of the spreadsheet will have to be defined for each of the address book fields listed in the export wizard.

Further help and information

A video tutorial of the PageOne Excel Plugin is available on the PageOne website at <http://www.pageone.co.uk/excel>. For more information or if you have a query, please contact customersupport@pageone.co.uk or telephone 0844 811 0070.