

Sending messages – step by step guide

Step 1 – Log into CleverVoice, and then choose “Messages” and “Create Message”

- i) Choose who your message is going to. If you already have addresses loaded up, you can start to type in their name, and it will appear.

If you want to add someone’s details, then choose “create address book entry”

Note: You can load up a block of data by going to “Address book” and importing a file of names & numbers (using a .csv file format) or an entire address book. (There are notes on the service about how to do this). Having loaded a file of data, you can give it a Group name, so you can then select this Group to send messages – as if it were one person, but now contains perhaps hundreds or thousands of names.

- ii) You can give the message a reference, just so in future you can easily find it.

Step 2 – time of sending and reminder text

Having chosen to whom the message is going to, press “Next”. You can then choose when the messages are to go out – they can go immediately or be set weeks in advance. (The default is a delay of 20 minutes to give you time for a final check – but you can override this.)

Some people look at their texts, and think they will listen later – then forget. You can arrange for a reminder text message to go out, so that just those people who have not listened to their message get a reminder “nudge” – saying they have an unlistened to message from you. This can lift listen levels by between 30% - 40%. Just select this option, then when you want the reminders to go out – after 12 hours, 1 day, 3 days or 5 days after the original message has been sent.

Step 3 - editing the SMS text alert that gets sent

Click on the button: “change SMS alert sent to recipients”.

You can type into the box what you want to say, with about 210 characters to work with.

If you wish, you can personalise each alert, by mail-merging into the alert perhaps the person’s name. Simply choose where you want this information to go in the text – and then click on the button of (say) the persons first name, from the choices above the box. (The more personalisation you do, then you have less free text characters are available to use)

(Under the text box is the text that gives the recipient the number to call to get their message for free: “To listen to your message call free (dial in number)”. An 0800 number is added automatically when it goes out).

N.B. There is a second text box at the bottom, appears at the end of the alert – and you can put more information here – perhaps an email address or a URL. The default setting is “Sent using CleverVoice”. This can be deleted if you wish – and then this frees up characters in the message to allow more text to be added to the main message box.

Please note that if you cut and paste text into these boxes from perhaps a document - to avoid issues with odd formatting being carried across it is worth checking how the messages will appear - things like apostrophes may not appear, and will need to be added in, on screen within the message being sent.

Step 4 – selecting options for recipients to have after hearing your message.

Click on the *“Select options for recipients”* button to then choose to set up a number of interactive options, that recipients hear after the voice message. You can choose from:

“please put me through to the sender” which is a Hot Call Transfer - so they are put through to a designated number when the recipient presses *“2”*.

“please call me back” – they press *“3”*

“please send me more information” – they press *“4”*

“yes/no” (they press *“5”* or *“6”*), or choose from *“Options A, B or C”* (they press *“7”, “8”* or *“9”*).

Tick the relevant boxes – and remember to double-check it is a valid number if you are using the Call Transfer feature. These can be landline/mobile numbers – and 0800 or 0845 numbers - but not premium numbers. The options that recipients will hear after the message are highlighted in blue.

Press *“Next”* when you are happy. You now get a check-screen screen that summarises what the message will look like, and from which name the SMS alert will come.

If you are happy, press *“Next”* – or go back and change the people getting the messages, or the SMS alert.

Step 5 – recording the voice message

There are two ways to get the voice message ready to be sent out...

- i) You can record a message by calling the number shown on the screen, from the number registered on your account. (You will also be sent a text message that conveniently gives you the number). Follow the instructions you hear, and when happy - you can give the ok for the message to go.
- ii) You can upload a pre-recorded message – ideal if you want to send out the same message a number of times, or you perhaps have a celebrity or senior executive in your organisation who has kindly recorded one for you.

That’s it! The messages will go out when the time is reached that you have set – and you can track progress as people listen to them and respond. You can play back the actual message sent, when looking at the *“Review messages”* screen.

A few last points:

- You can change the name that the SMS alert comes from by going to *“Users”* on the tool bar, and select *“change SMS from field”*. You can use up to 11 alpha numeric characters as one word – so maybe *“Richard”*, *“JohnH”*, *“Company123”* or *“Voicemail”*.
- When sending a message out, you can create a Template, or you can copy one sent before, by choosing *“Copy”* when reviewing past sent messages.
- You can see in real time when people are listening to messages, and any actions taken by choosing *“Review Messages”*. You can look at any *“Tasks”* that are outstanding (*“Call me back”* etc.) – and all the data can be exported as a spreadsheet by choosing *“Export details”* when reviewing a message.
- Please note... CleverVoice works best when you use Chrome or Firefox as your browser, or a very recent version of Internet Explorer. Older versions of Internet Explorer can cause some issues requiring you to refresh the screen to see the latest information on sent messages – so we recommend using Chrome or Firefox.