



VERSION 2.7.30 RELEASE TRAINING NOTES

The Primary focus on this release has centred around the ability to merge seamlessly to an SMS.

Text messages have a surprisingly good response rate. We don't recommend using them for communications where the objective is sales – your contacts and customers will get sick of them very quickly. However, they are brilliant to use to simply touch base, ask them how they enjoyed their new purchase last week, or to remind them of an event, or to touch base after an event.

Changes:

1. Strips mobile number of brackets, spaces, hyphens, periods, and any other characters other than numbers in the synch and adds a postfix to enable mail merge to SMS – ie, you don't have to clean these up in your synch programme.
2. Cleans mobile numbers for new Standard and Linked Contacts and adds mobile with postfix to email 2 field
3. If you open and save an existing standard or linked contact which has a mobile number in the mobile phone field, will strip and add postfix
4. Adds "Clear Pipeline Data" to the Sales Pipeline to remove all pipeline data, instead of having to do one field at a time.

Installation Instructions:

These have been forwarded to you in your email

Setup Instructions:

There are 2 areas where we need to set up the postfix for mobile phone numbers:

1. **In the Synch setup – not required for non synch users.**
 - a. Click on Synchronise | Setup
 - b. Check the box in front of "Write email 2 and email 3 with the following postfixes"
 - c. Under email 2 postfix, type in "**@sms.utbox.net**"
 - d. Ignore email 3 postfix
 - e. Click OK. Each time you synch, the mobile number for the primary contact will be added to the "Email 2" field with the postfix. **(For MYOB Accounting users, as there is no designated "Mobile Phone" field, we use "Phone 3" as the mobile)**

Email 2 & 3 Settings

Write email 2 and email 3 with the following postfixes

Email 2 Postfix:

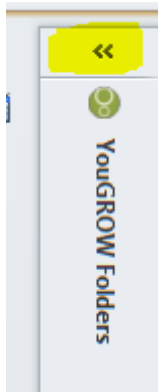
@sms.utbox.net

2. **For Standard and Linked Contacts:**

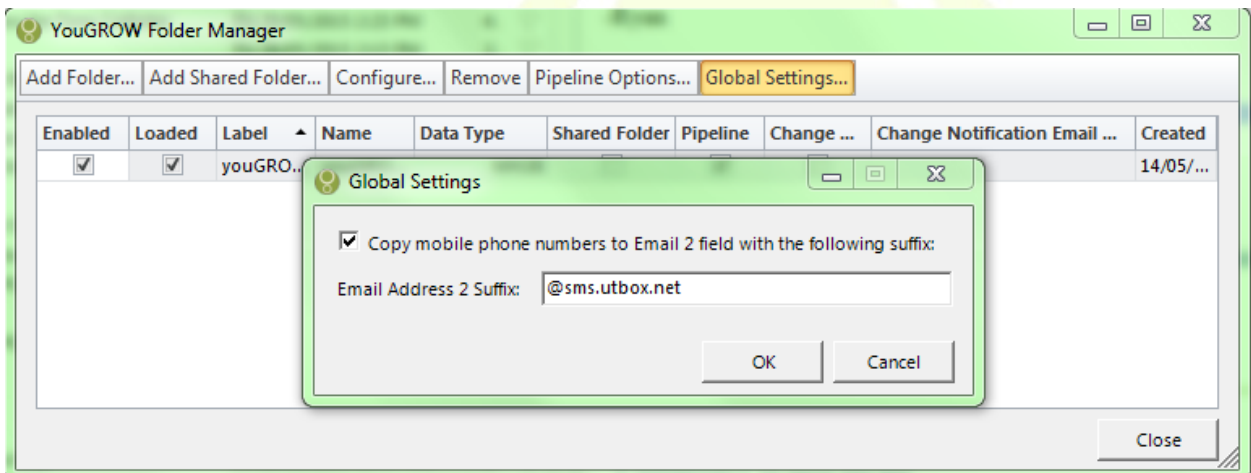
- a. Click on the youGROW "Manage Folders" tab on the far right hand side of the Outlook screen. (If this is minimised, just click the expand arrows to expand)



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- b. Click on the “Global Settings” Tab
- c. Check the box as below, and type in”**@sms.utbox.net**”



- d. Now, each time you add a new or linked contact, or open and save an existing Linked or Standard contact, the postfix will be added to the email 2 field.
- e. If you have hundreds of standard and linked contacts, contact support@yougrow.com.au and we will show you how to handle many simultaneously.

Using Merge to SMS:

OK – this is where the fun starts. 😊 I have set up an account for you with UTBox – with \$5 credit so that you can test and see how it works. (I have included logon details in my email to you)



NB: UT Box is a Melbourne based SMS provider. We like them as they only charge 8cents per SMS (remember that each 160 characters is counted as one SMS); and they don't lock you in to any going contracts – you can simply buy credit as you need to.

1. Go to your **Test Emails View**
2. Open each contact and ensure you have mobile phone numbers entered in for each. Make sure you have yourself in there with your mobile number so you can see the results.
3. Save and close each one. (Re-open one and click on the email field label – select email 2, and you will see the mobile with a postfix added.)

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Internet

E-mail 2...

Display as:

Web page address:

4. Still in your Test Email view, click on **Communicate**
5. Leave the default settings as they are – with **New Document** selected

Mail Merge Contacts

Contacts All contacts in current view Only selected contacts

Fields to merge All contact fields Contact fields in current view

To filter contacts or to change the columns in the current view, on the View tab, point to Current View, and then choose a command.

Document file New document Existing document: Browse...

Contact data file

To save this contact data for future use or reference, specify a file name.

Permanent file: Browse...

Merge options

Document type: Merge to:

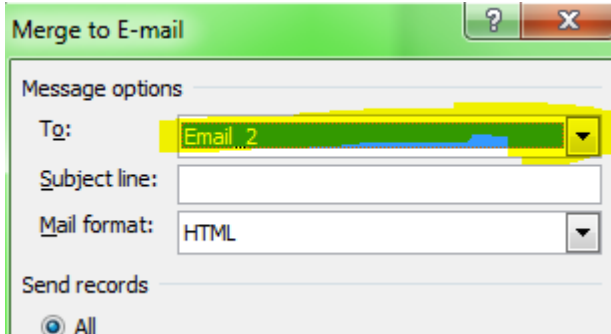
OK Cancel

6. Click **OK**
7. Word will now open
8. Type in Hi | space | Insert Merge fields, and select “First name”. Just put a comma or full stop – no return, and type in something like “This is a test, Cheers, Your name @ your company name”. Don’t include returns, or smileys, or photos or graphics. (Always let them know who you are

Hi-«First_Name»,This is a test. Cheers, Cathy@youGROW

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- Click on Finish and Merge | Merge to Email. Click on the down arrow next to email, and select “Email 2”



Merge to E-mail

Message options

To: **Email... 2**

Subject line:

Mail format: HTML

Send records

All

- Click OK. (Word will ask if you want to send a message without a subject line – click “Send Anyway”). (You don’t need a subject line in an SMS.)
- Your message will be sent to your Test recipients via SMS. Cool! Obviously you can do this to any group of contacts in any view – where you have a mobile number.
- When you receive your own SMS – reply to it, and you will see that it comes in directly to your Outlook Inbox.



To see which contacts you have a mobile for, create a View where “Mobile Phone” is not empty – or add this filter to any existing view. You could also add a filter to find those customers with an email, but no mobile, and send them an email asking them for their mobile.



Use SMS to: remind people of an event they have booked for; to follow up after an event to say Thanks for coming; to thank them for buying from you last week; to say “We miss you – is everything ok”, to those who haven’t bought for a while; to let them know you will be in their area and ask them for a time to see you; and for bounced email

Using Clear Pipeline Data:

This is fairly simple. When you have a contact open and you want to clear all the current pipeline data – eg, the sale has been closed – just click “Clear All Pipeline Data” at the bottom of the Pipeline form.

Exclude from marketing?

Pipeline Settings...

Clear All Pipeline Data