



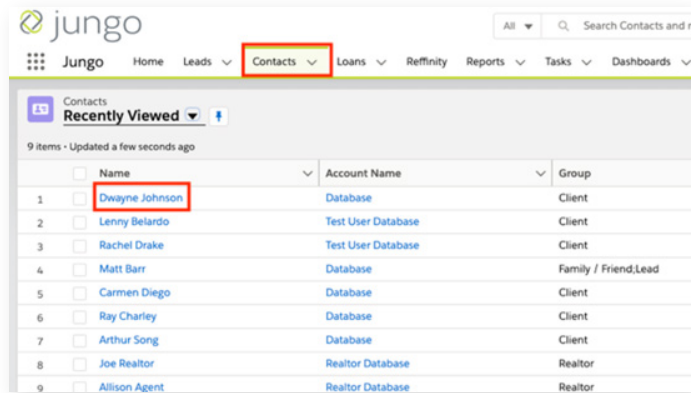
JUNGO SMS USER GUIDE 1

Basic Jungo SMS Features

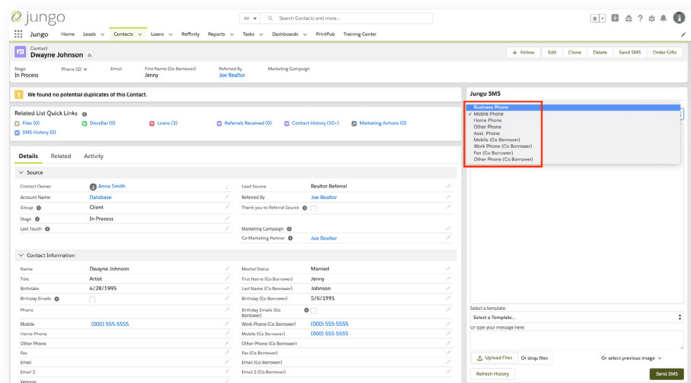


One-on-One SMS Messages

1. To send a one-on-one SMS message, first navigate to the contact page of the client you would like to send the one-on-one message to.

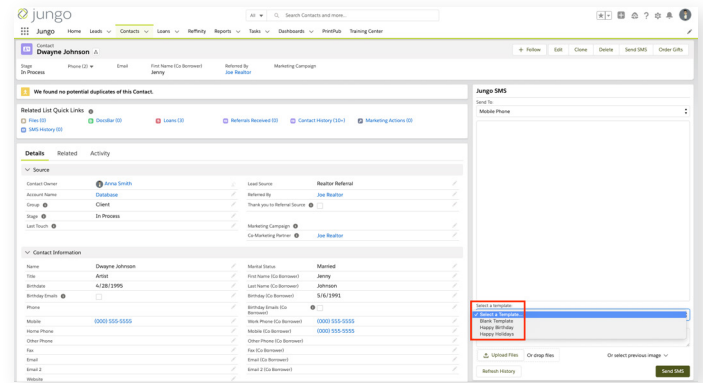
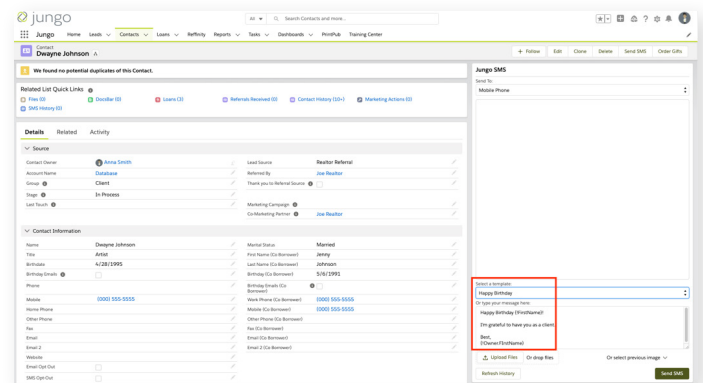


2. You'll find the Jungo SMS component on the right-hand side of the contact page. Select the phone number you would like to send the SMS message to.

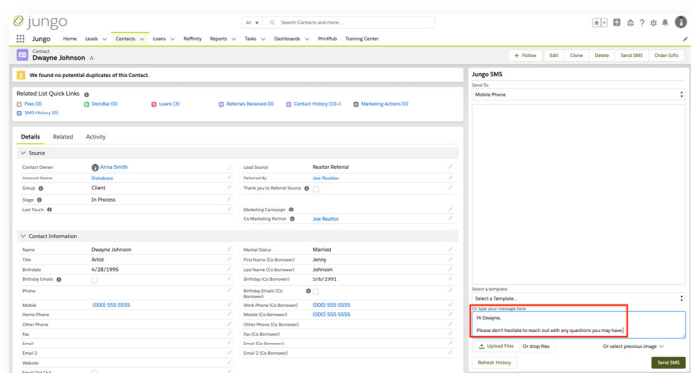


3. You can choose from a template message previously created.

For more tips and tricks on how to create Jungo SMS templates see our [Jungo SMS Templates Guide](#):
[SMS Templates](#)
[Mass SMS](#)

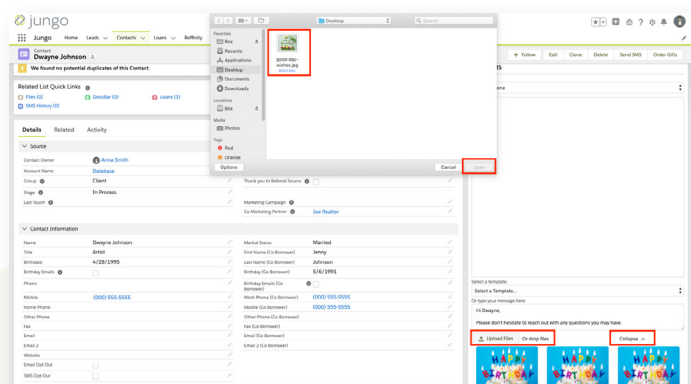


Or type up a quick message in the text box.

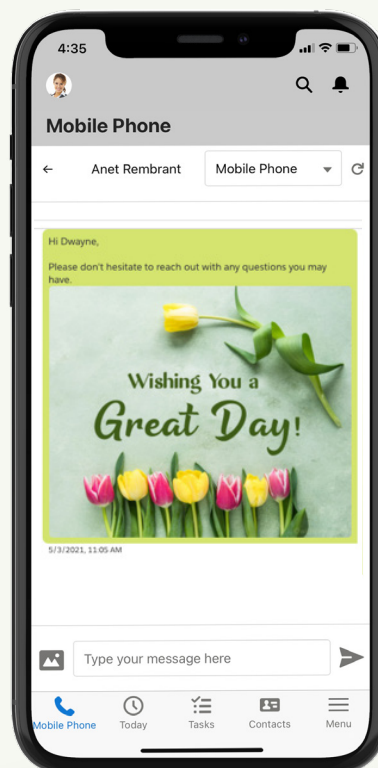
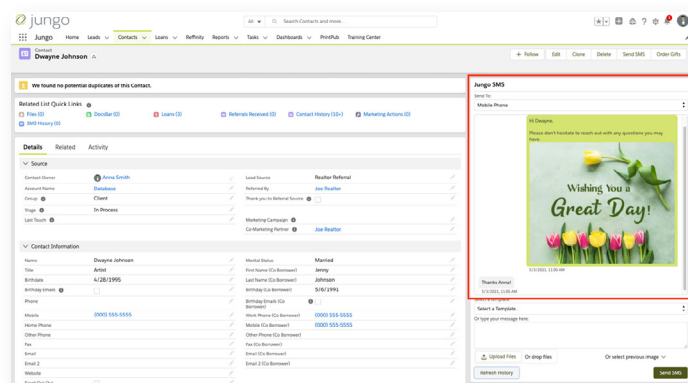
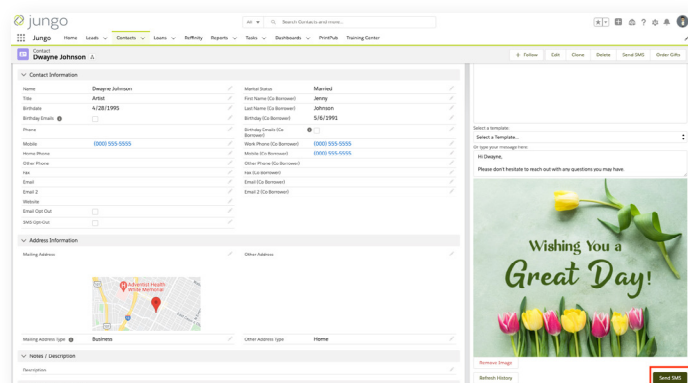


- To attach an image, either select from a recently uploaded image by clicking **Select Previous Image**, or an image saved on your computer by clicking on **Upload Files**.

For more tips and tricks on attaching images to your SMS messages see our Jungo SMS Image User Guide).




- Click **Send SMS** and all inbound and outbound SMS History will be displayed within the Jungo SMS Component.



SMS Opt Outs




1. Jungo SMS also comes equipped with an Introductory template to help ensure compliance.

Note: All Jungo SMS users are required to send the "Introduction Template" as their initial SMS message to anyone that they will be communicating with via SMS message.


SMS Template
Introduction

Related

Details

SMS Template Name	Introduction	Owner	 Anna Smith
Message	<div> Hi {FirstName}, You will now receive updates from me through this business texting number. Reply STOP at anytime to unsubscribe. </div>		
Category	One-On-One;Mass SMS		
Created By	 Anna Smith, 7/20/2021, 11:05 AM	Last Modified By	 Anna Smith, 7/20/2021, 12:53 PM

[Available Template Fields](#)

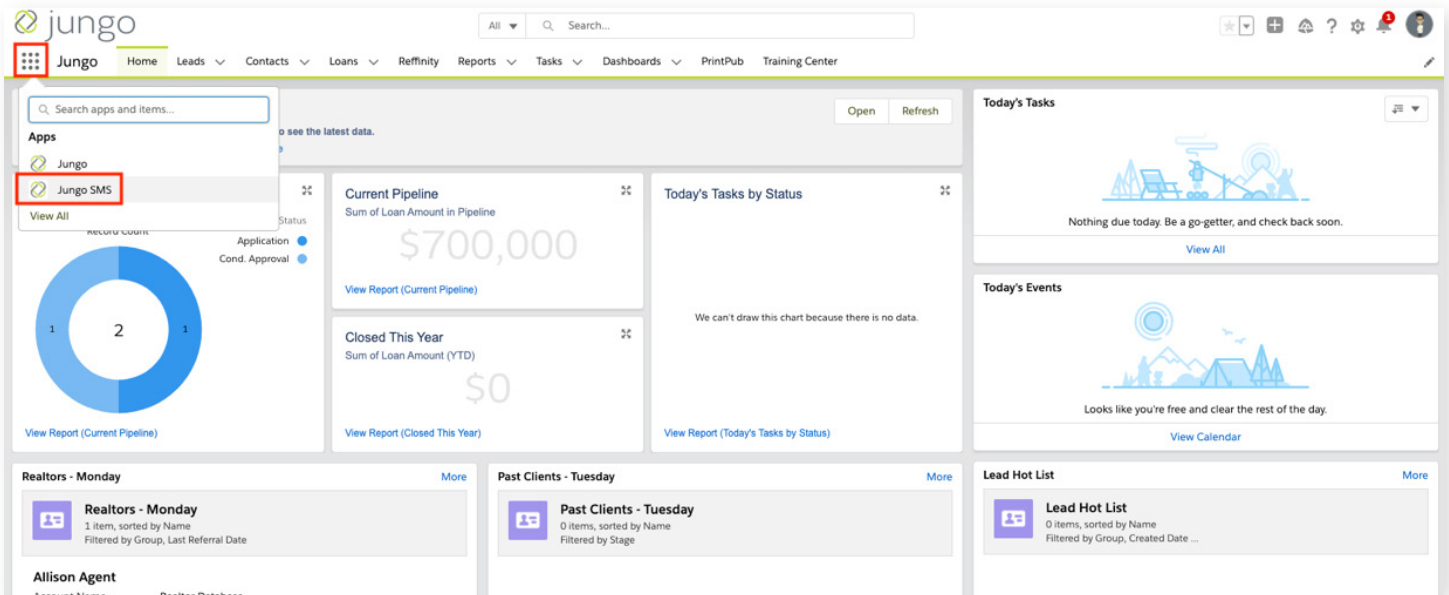
2. Additionally, when sending Mass SMS messages, you must include the following:

Please reply STOP if you no longer wish to receive text messages from this number.

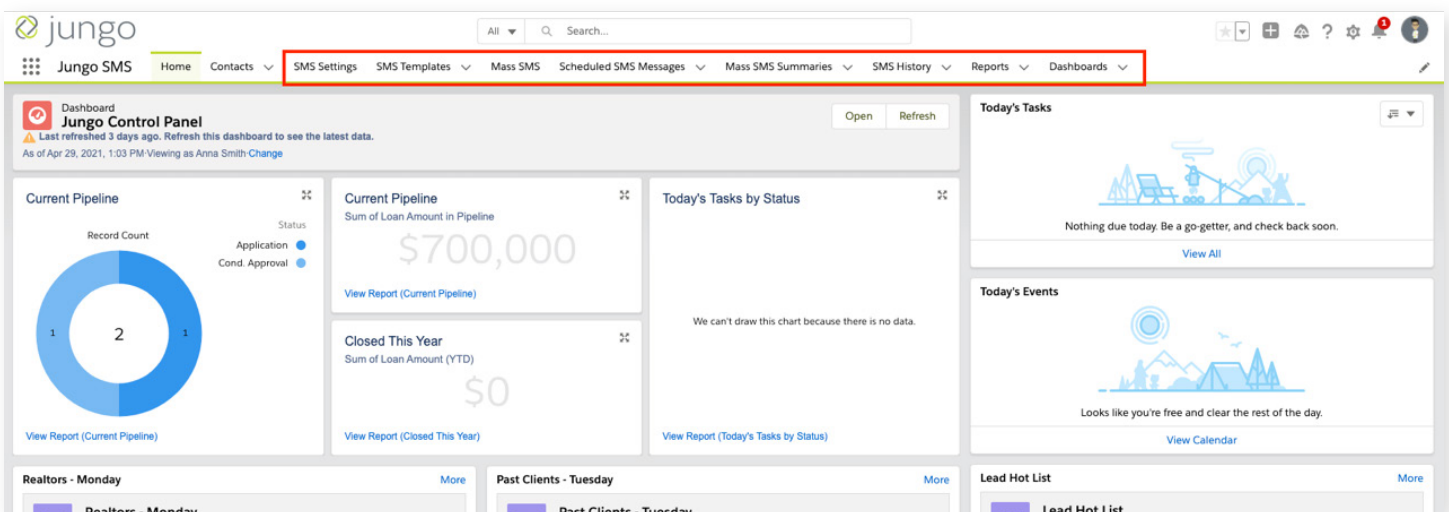
This will check an SMS Opt-Out box on their contact page. **Please note: You will no longer be able to send One-on-One or Mass SMS Messages to the Contact, even if you uncheck the SMS Opt-Out box, unless they reply START to resubscribe. You will get an error message if you try to send an SMS to a Contact that has opted out.

How to Navigate to the Jungo SMS App

1. To navigate to the Jungo SMS App, click on the **App Launcher** (9 dots) in the upper left-hand corner and select **Jungo SMS**.

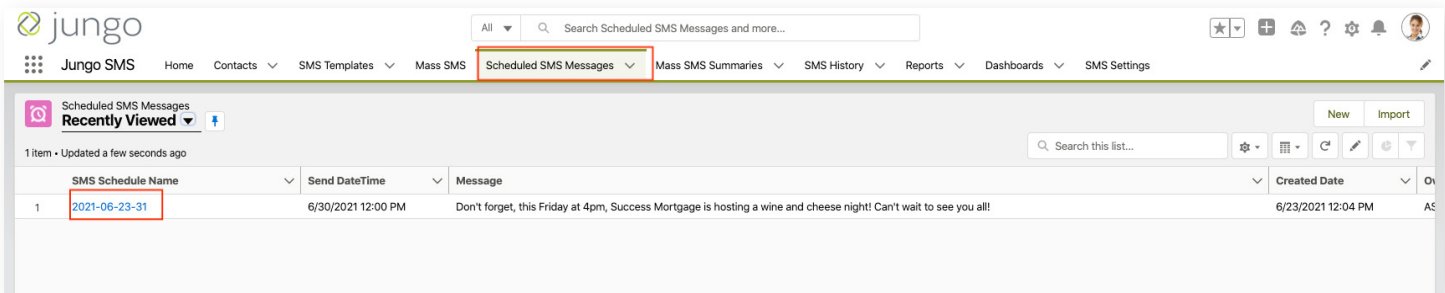


2. At the top of your Jungo SMS app, you'll find your SMS functions.

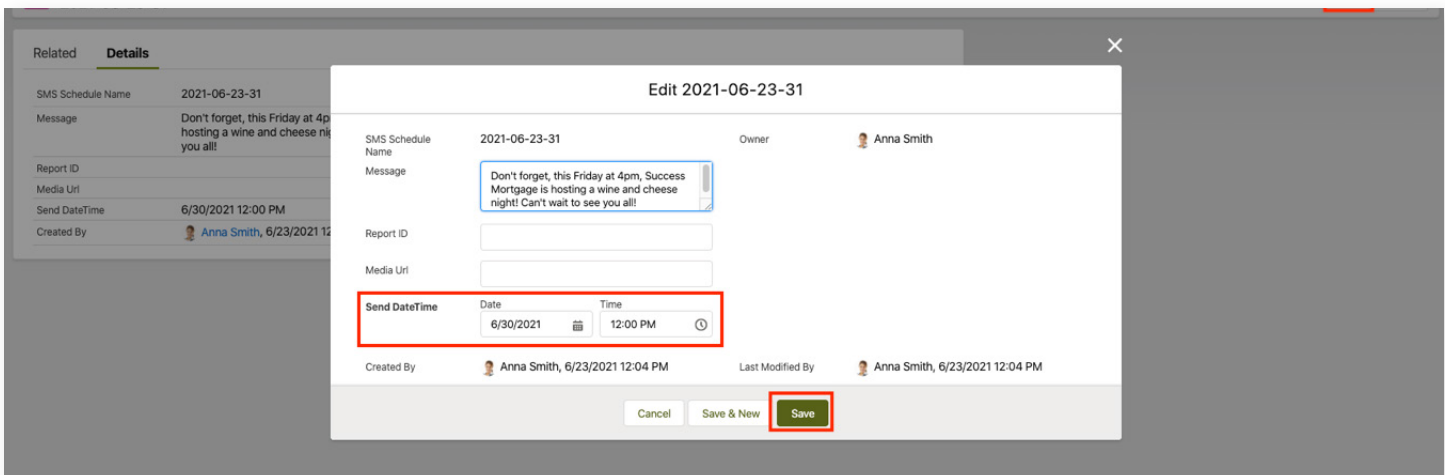


Viewing Scheduled Mass SMS Messages

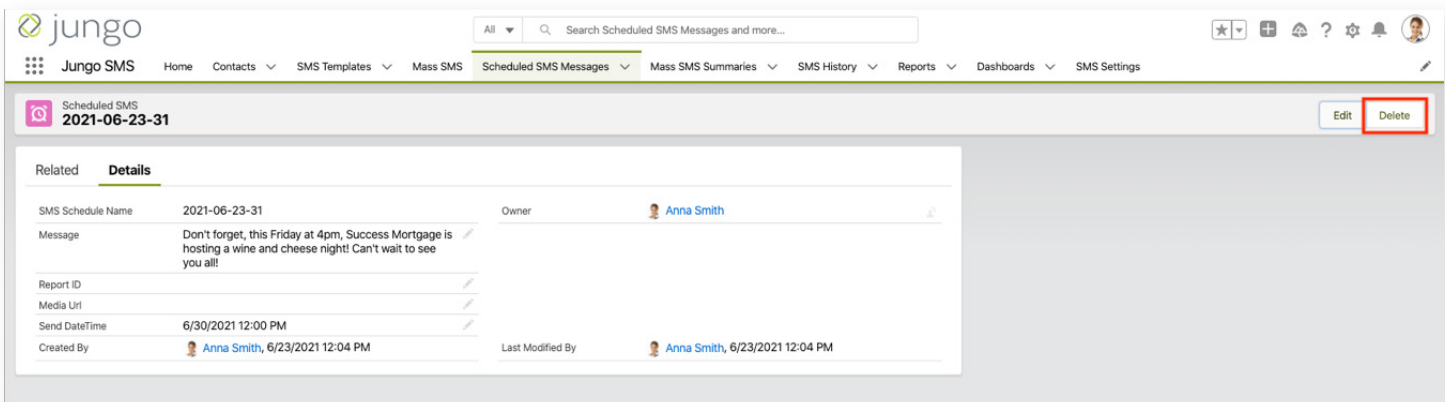
1. If you have previously scheduled a Mass SMS message to be sent at a later time, you can view these scheduled Mass SMS messages under the **Scheduled SMS Messages** tab.



2. If you need to make Edits to a Scheduled SMS Message, click the **SMS Scheduled Name**, and then click the **Edit** button. From here you can change the scheduled date or time.

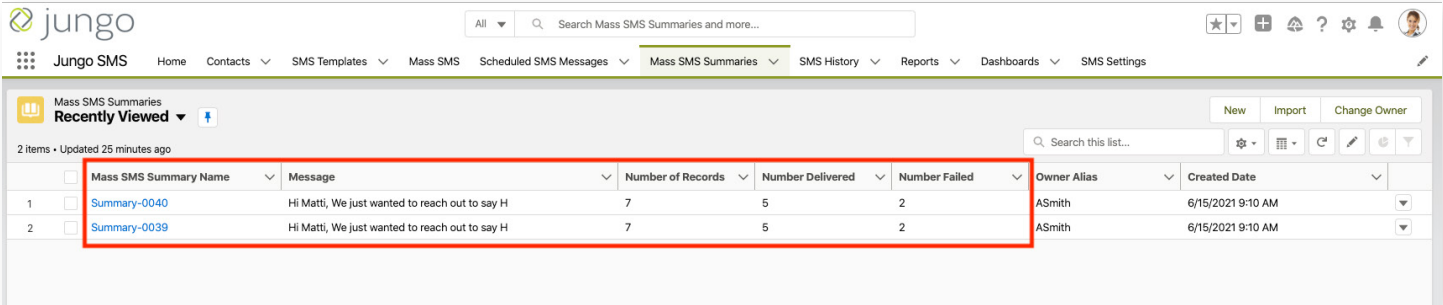


3. You can also cancel the Scheduled SMS Message all together by clicking **Delete**.

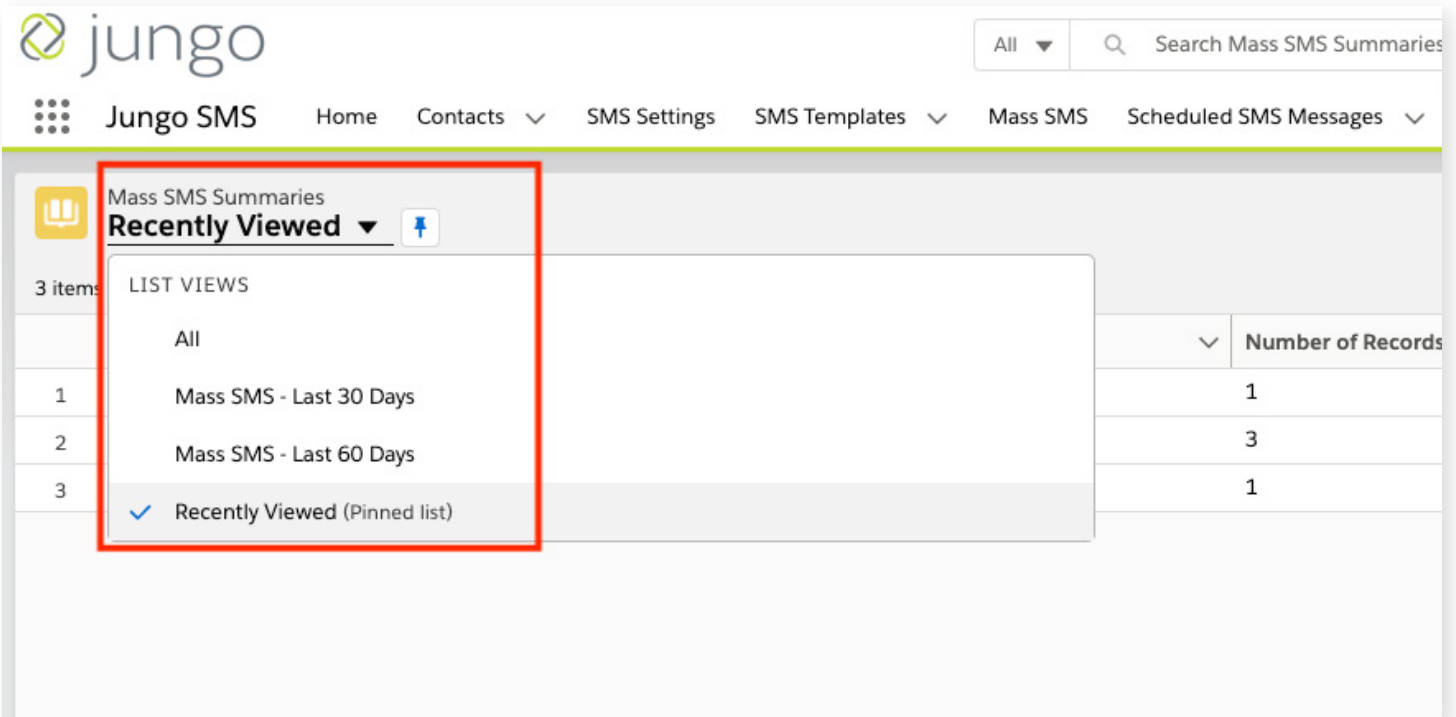


Mass SMS Summaries

Under the **Mass SMS Summaries** tab, you can find a history of all Mass SMS messages sent summarized by how many were sent and how many were delivered per Mass SMS message. You can view All, Last 30 Days, or Last 60 Days.



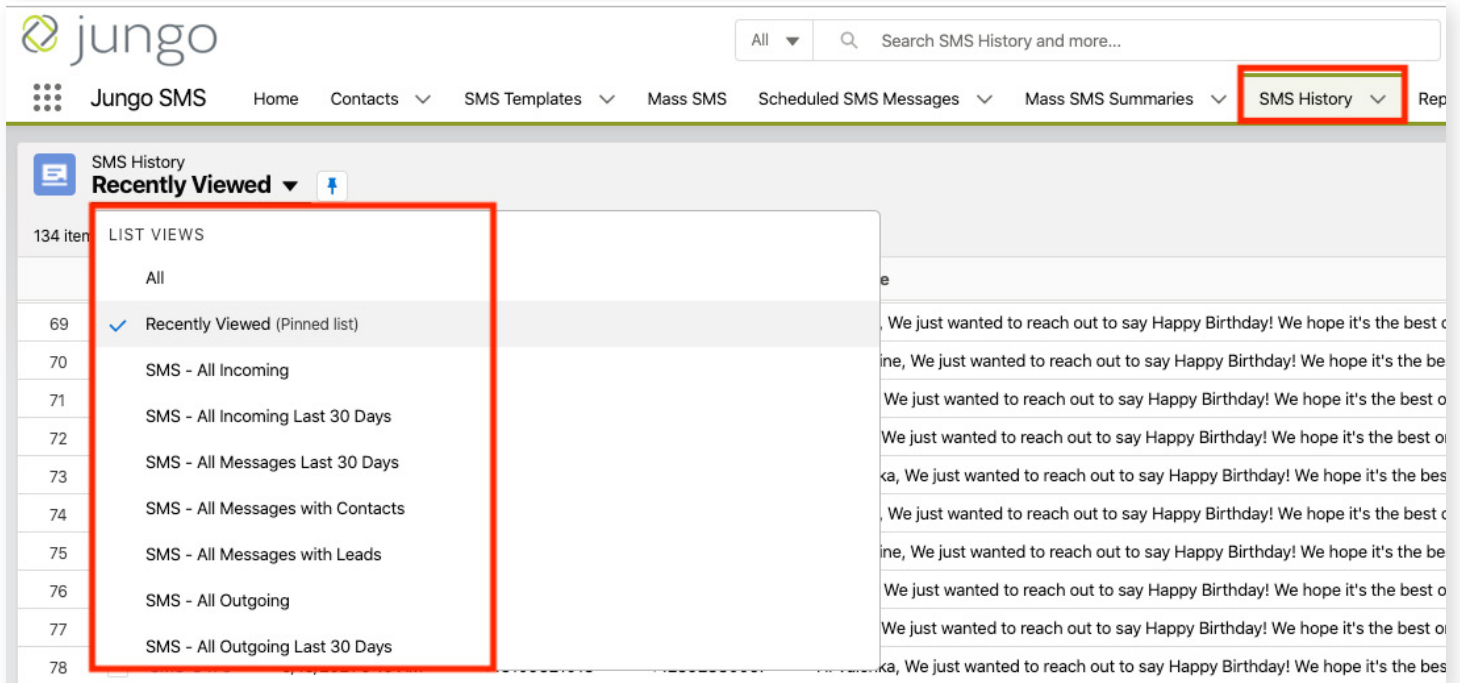
	Mass SMS Summary Name	Message	Number of Records	Number Delivered	Number Failed	Owner Alias	Created Date
1	Summary-0040	Hi Matti, We just wanted to reach out to say H	7	5	2	ASmith	6/15/2021 9:10 AM
2	Summary-0039	Hi Matti, We just wanted to reach out to say H	7	5	2	ASmith	6/15/2021 9:10 AM



	LIST VIEWS	Number of Records
	All	1
1	Mass SMS - Last 30 Days	3
2	Mass SMS - Last 60 Days	1
3	✓ Recently Viewed (Pinned list)	

SMS History

Under the SMS History tab, you can find a history of all incoming and outgoing SMS messages. You will find various List Views for Incoming, Outgoing, and All SMS Messages.



The screenshot shows the Jungo SMS History interface. The top navigation bar includes the Jungo logo, a search bar, and several tabs: Home, Contacts, SMS Templates, Mass SMS, Scheduled SMS Messages, Mass SMS Summaries, and SMS History (highlighted with a red box). Below the navigation bar, the 'SMS History' section is active, showing a 'Recently Viewed' dropdown menu (also highlighted with a red box). The dropdown menu lists various list views for SMS messages, including 'All', 'Recently Viewed (Pinned list)', 'SMS - All Incoming', 'SMS - All Incoming Last 30 Days', 'SMS - All Messages Last 30 Days', 'SMS - All Messages with Contacts', 'SMS - All Messages with Leads', 'SMS - All Outgoing', and 'SMS - All Outgoing Last 30 Days'. The background shows a list of SMS messages with a repeating text snippet: 'We just wanted to reach out to say Happy Birthday! We hope it's the best c'.

Reports and Dashboards

1. With Jungo SMS Reports and Dashboards, you can review your Jungo SMS metrics such as incoming messages, outgoing messages, percentage of delivered messages, etc.

Reports

All Folders > SMS Reports

Q Search all folders... New Report New Report (Salesforce Classic) New Folder

REPORTS	Name	Description	Folder	Created By	Created On	Subscribed
Recent	SMS - All Messages Last 30 Days		SMS Reports	Anna Smith	4/19/2021, 10:11 AM	
Created by Me	SMS - All Messages		SMS Reports	Anna Smith	4/19/2021, 10:11 AM	
Private Reports	SMS - Incoming Messages Last 30 Days		SMS Reports	Anna Smith	4/19/2021, 10:11 AM	
Public Reports	SMS - Incoming Messages Last 3 Days		SMS Reports	Anna Smith	4/19/2021, 10:11 AM	
All Reports	SMS - Mass Messages Response Breakdown		SMS Reports	Anna Smith	4/19/2021, 10:11 AM	
	SMS - Mass SMS Summaries		SMS Reports	Anna Smith	4/19/2021, 10:11 AM	
FOLDERS	SMS - Outgoing Messages Last 30 Days		SMS Reports	Anna Smith	4/19/2021, 10:11 AM	
All Folders	Mass SMS - All Contacts		SMS Reports	Anna Smith	4/19/2021, 10:11 AM	
Created by Me	Mass SMS - My Contacts		SMS Reports	Anna Smith	4/19/2021, 10:11 AM	

2. There are quite a few reports that are already created in your account by default with Jungo SMS, however you can always add to these reports or modify existing ones by either clicking **Edit** on an existing report or using the **Save As** button to clone the report.

Jungo SMS Home Contacts SMS Templates Mass SMS Scheduled SMS Messages Mass SMS Summaries SMS History Reports Dashboards SMS Settings

Report: SMS History

SMS - Outgoing Messages Last 30 Days

Q Add Chart Edit

Date Sent	SMS History: Owner Name	SMS History: SMS Message Name	Contact	Lead	Message
7/8/2021 (4)	Anna Smith (4)	SMS-3551	-	-	The disclosures have been sent for your loan in process. Please review and return the signed disclosures to me within 48 hours.
		SMS-3550	-	-	You are conditionally approved. Underwriting needs a few more documents. I'll call/email soon with what we need.
		SMS-3548	-	-	Your appraisal has been ordered. As soon as we receive the appraisal, I will let you know.
		SMS-3549	-	-	The appraisal on your loan in process has been received. Call me at (619) 368-0397 if you have any questions, or visit my website at help.jungo.com. Thank you!

Edit (Salesforce Classic)

Save As

Save

Subscribe

Export

Delete

Add to Dashboard

Where this might come in most handy is with your Mass SMS reports. You can use the **Save As** button on either of these default reports to create additional Mass SMS reports with your own filters. See our Jungo SMS Mass SMS User Guide for more tips on how to create reports for sending Mass SMS messages.

3. To see many of these reports represented with visuals, head over to the Dashboards tab and click on the **SMS Dashboard**.

Jungo SMS Home Contacts SMS Settings SMS Templates Mass SMS Scheduled SMS Messages Mass SMS Summaries SMS History Reports Dashboards

Dashboards

All Folders > SMS Dashboards

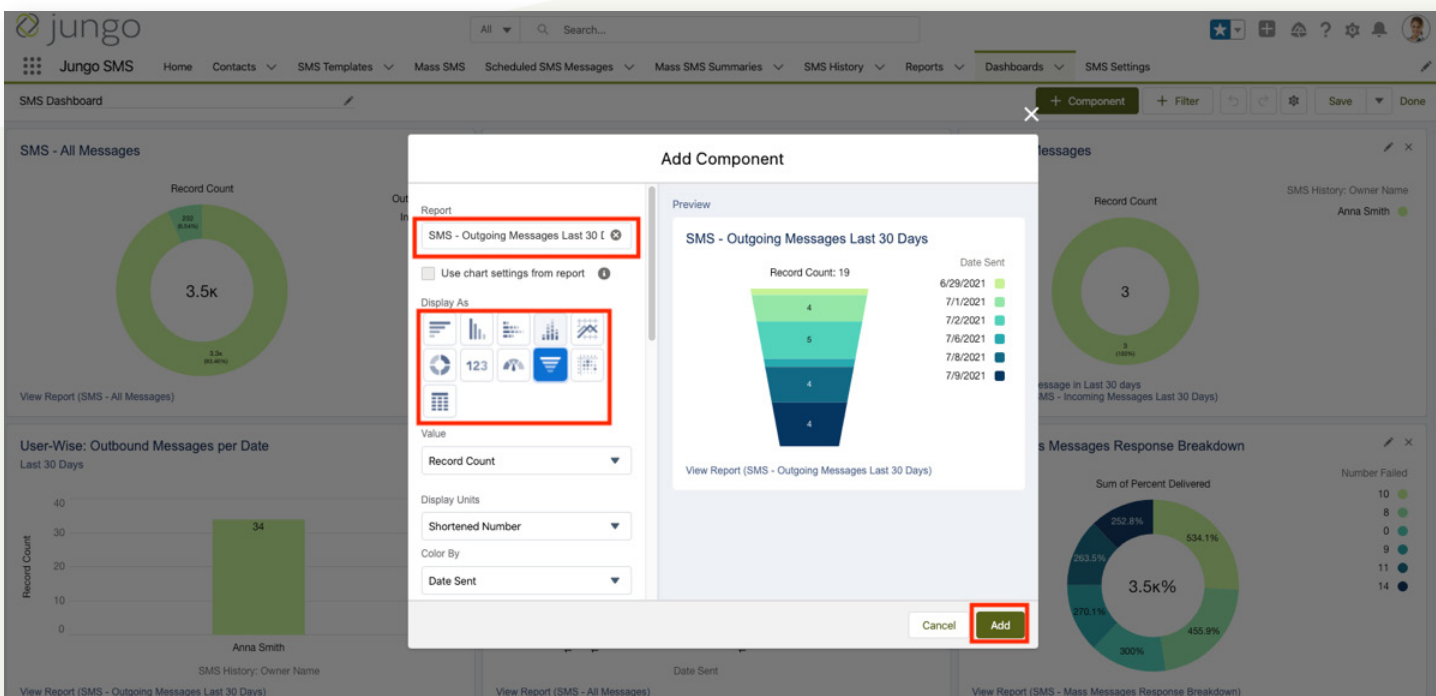
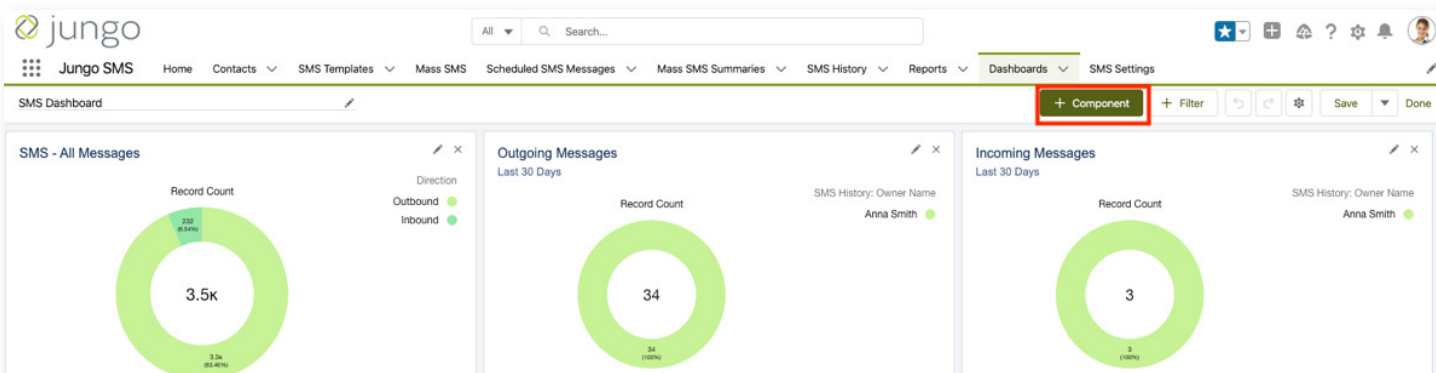
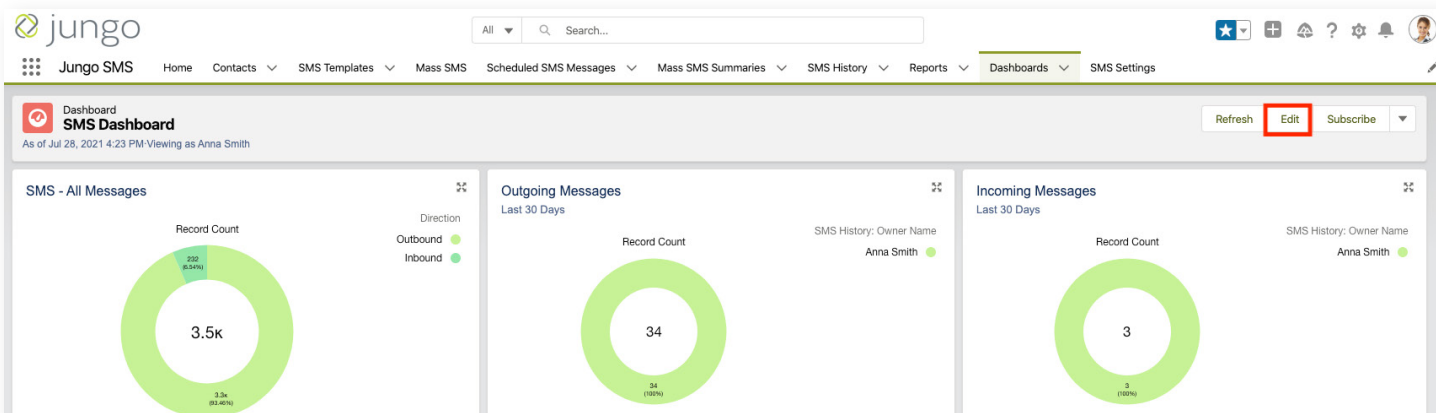
Q Search all folders... New Dashboard New Folder

DASHBOARDS	Name	Description	Folder	Created By	Created On	Subscribed
Recent	SMS Dashboard		SMS Dashboards	Anna Smith	4/19/2021, 10:11 AM	

FOLDERS

All Folders

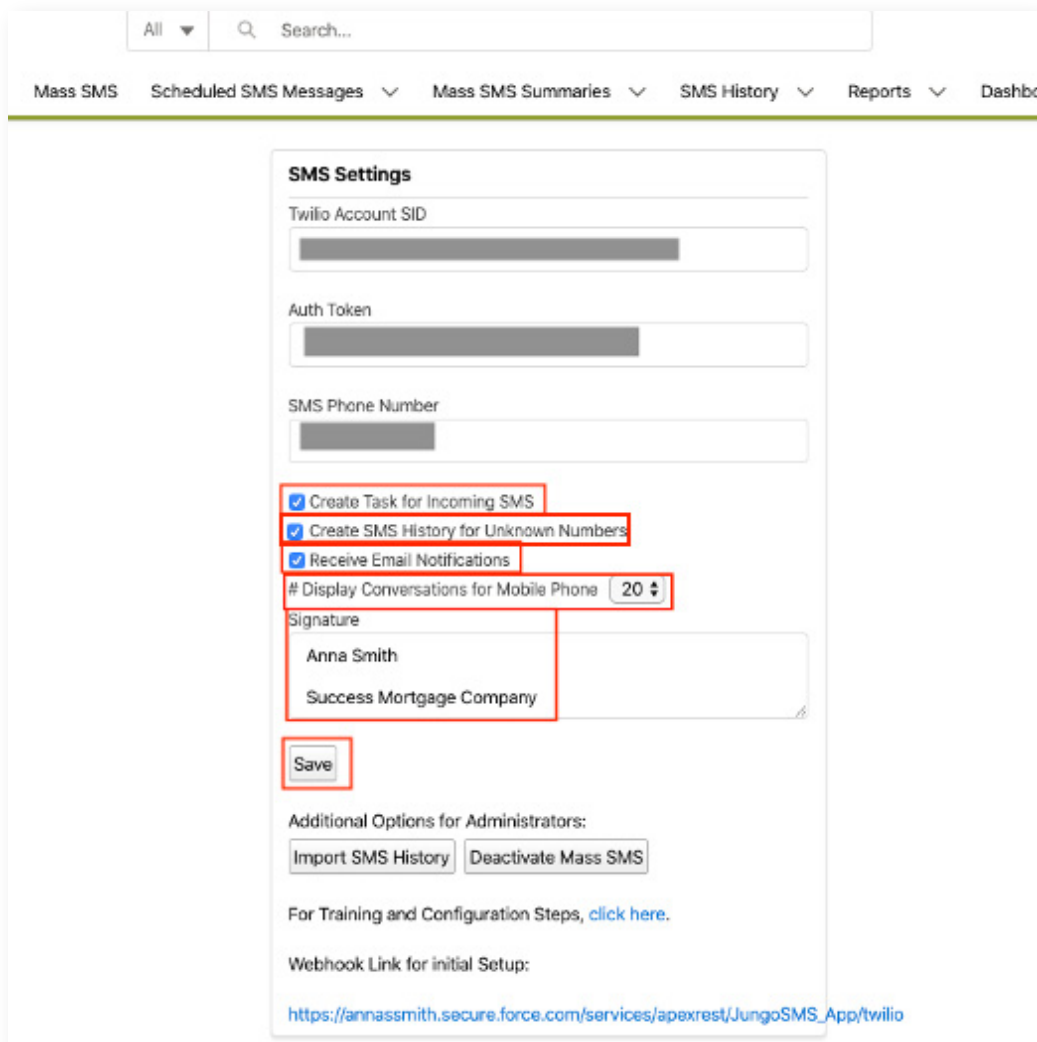
4. You can add your own Reports to the **SMS Dashboard** by clicking on **Edit**, and then **Adding a New Component**. Simply choose the Report you'd like to add, and then choose the type of Dashboard you'd like it displayed as.



SMS Settings

Configure your Jungo SMS preferences by navigating to the **SMS Settings** tab. From here you can enable the following settings:

- Create Task for Incoming SMS
- Create SMS History for Unknown numbers
- Receive Email Notifications for incoming SMS
- Number of Display Conversations for Mobile Phone
- Signature that appears at the bottom of all outbound SMS messages.



All ▼ Search...

Mass SMS Scheduled SMS Messages ▼ Mass SMS Summaries ▼ SMS History ▼ Reports ▼ Dashboard

SMS Settings

Twilio Account SID

Auth Token

SMS Phone Number

☒ Create Task for Incoming SMS

☒ Create SMS History for Unknown Numbers

☒ Receive Email Notifications

Display Conversations for Mobile Phone 20 ▼

Signature

Anna Smith

Success Mortgage Company

Save

Additional Options for Administrators:

Import SMS History Deactivate Mass SMS

For Training and Configuration Steps, [click here](#).

Webhook Link for initial Setup:

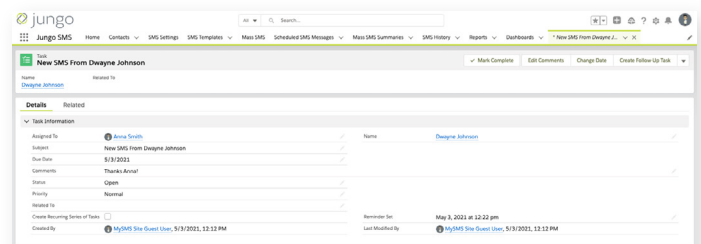
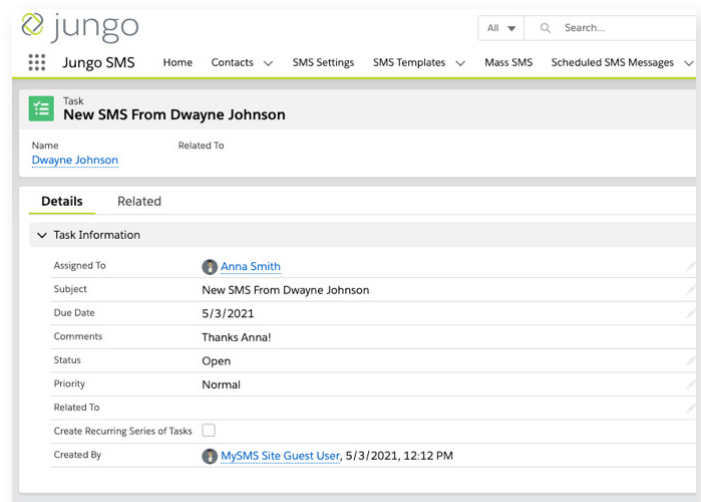
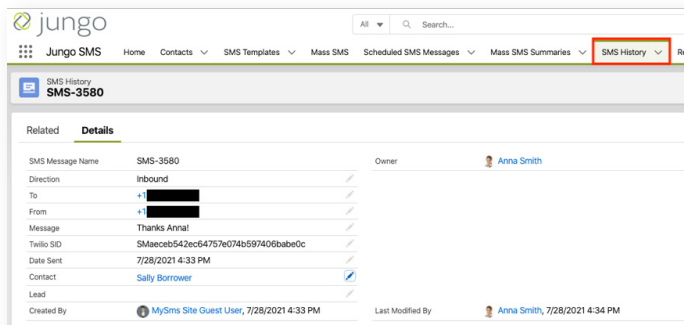
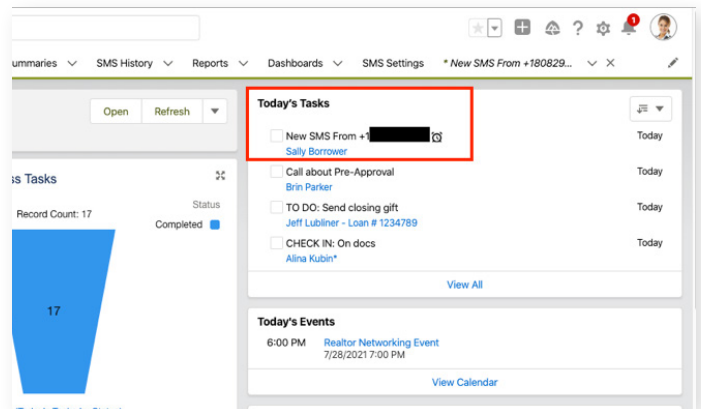
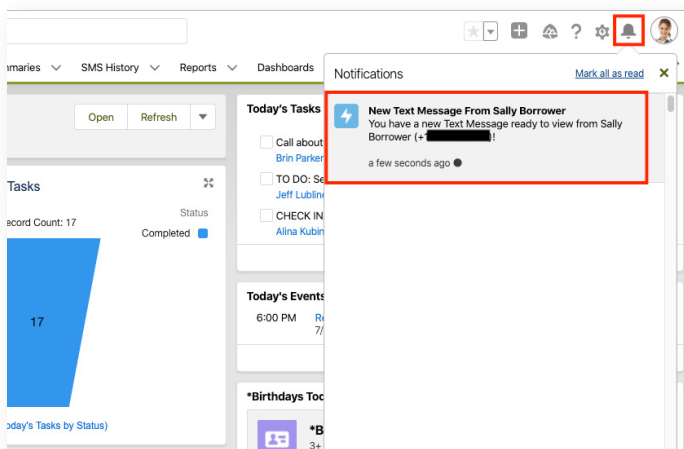
https://annasmith.secure.force.com/services/apexrest/JungoSMS_App/twilio

Inbound Messages

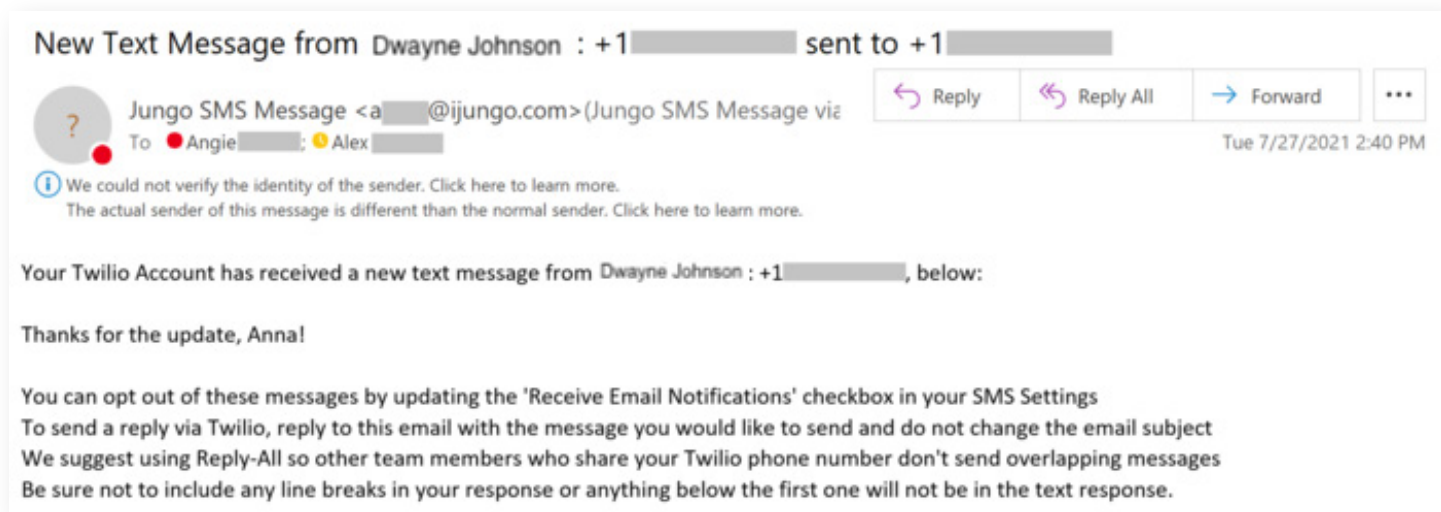
1. Depending on the preferences configured within your SMS Settings tab, here is how you will be notified of inbound SMS messages:

- **NOTIFICATION:** Regardless of the preferences set in the SMS Settings tab, all inbound SMS messages from contacts that you own will be accompanied by a notification in the bell icon in the upper right-hand corner. Clicking into the notification will open the SMS History that was created for that particular inbound message.

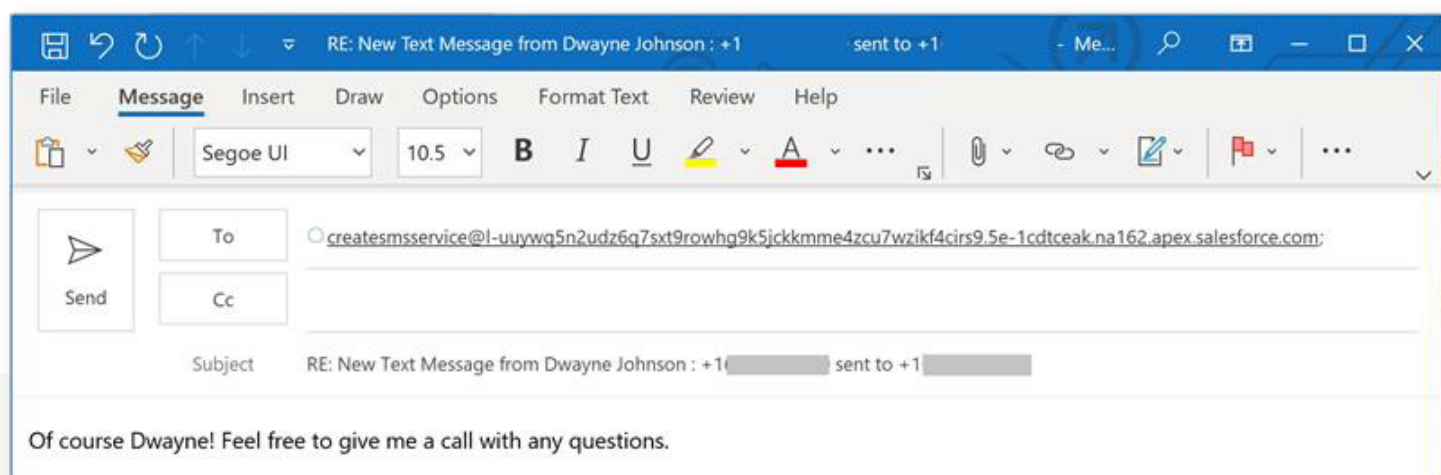
- **TASK:** If the “Create Task for Incoming SMS” preference is enabled, a task that is due today will populate on your home page. You can click into the task to view the details of the inbound SMS message.



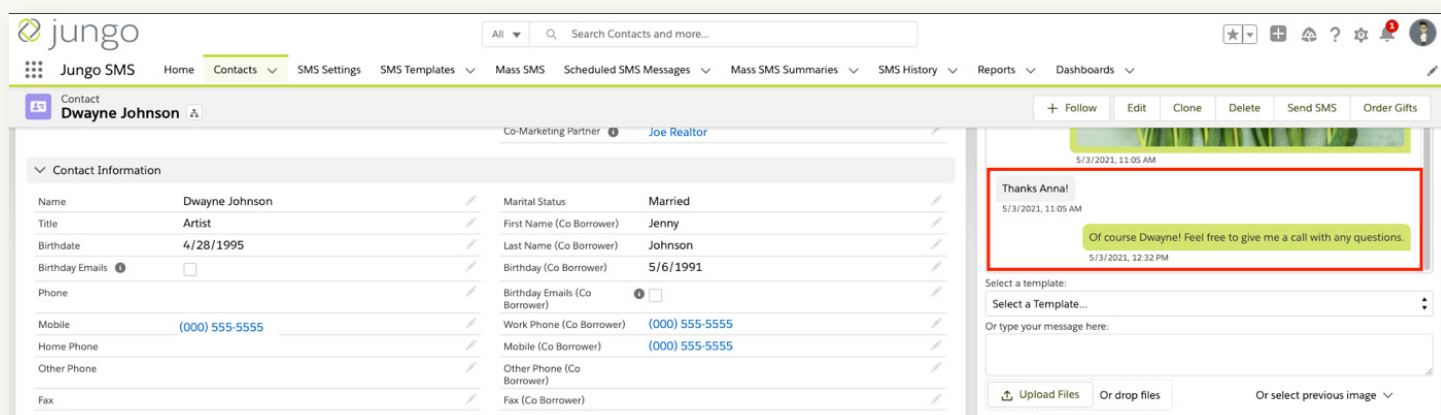
- **EMAIL ALERT:** If the "Receive Email Notification" preference is enabled within the SMS Settings tab, then you will also receive the following email when an inbound SMS message is received:



You can reply to the email notification to quickly respond to the client who sent the inbound SMS message.

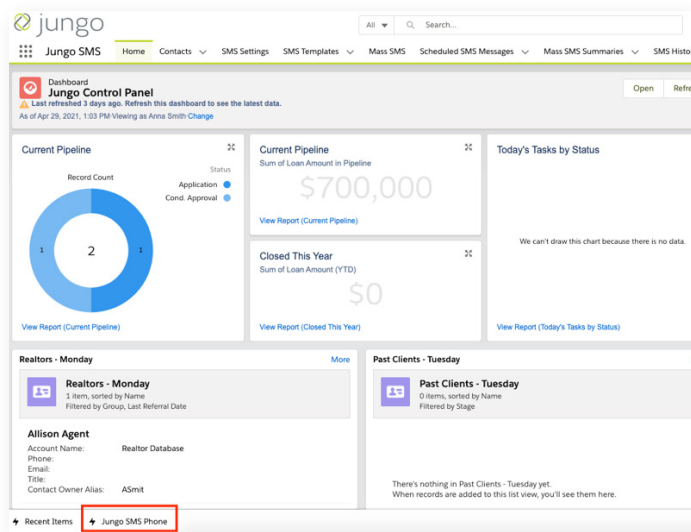


The SMS History for your response will be displayed within Jungo.

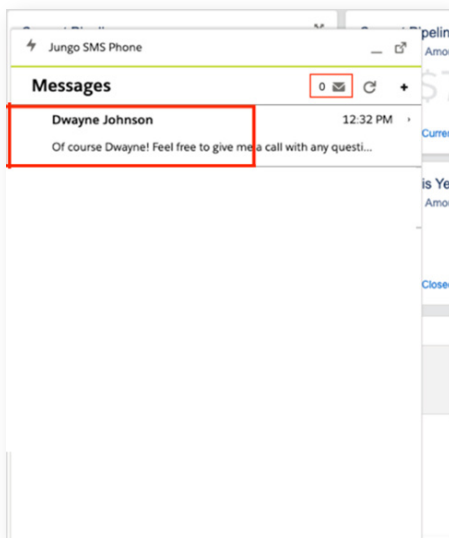


Jungo SMS Phone

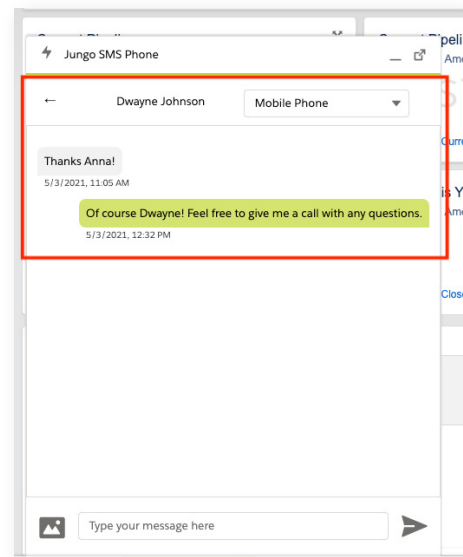
1. To view several Jungo SMS conversations at a time, navigate to the **Jungo SMS Phone** in the lower left-hand corner of the Jungo SMS app.



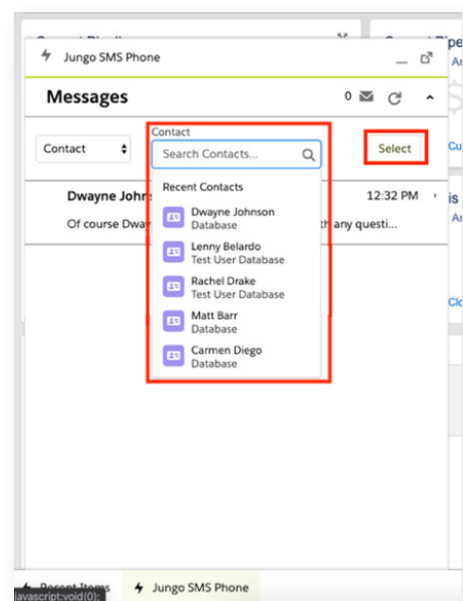
2. You can see recent conversations by expanding the Jungo SMS Phone component and you'll find an envelope icon in the upper right-hand corner with a number to the left displaying the number of unread messages you have.



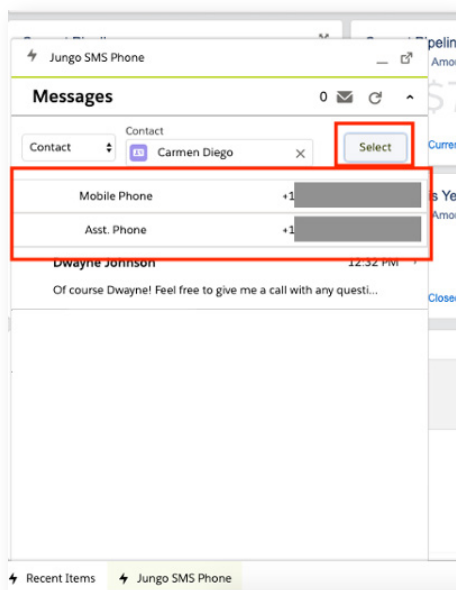
3. Clicking into a conversation you can view inbound and outbound SMS History.



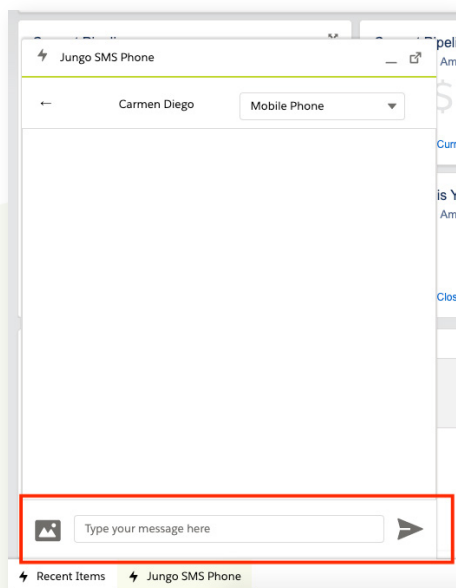
4. To start a new conversation, click on the **Plus (+)** button in the upper right-hand corner, from there you can search for the desired contact record, and click **Select**.



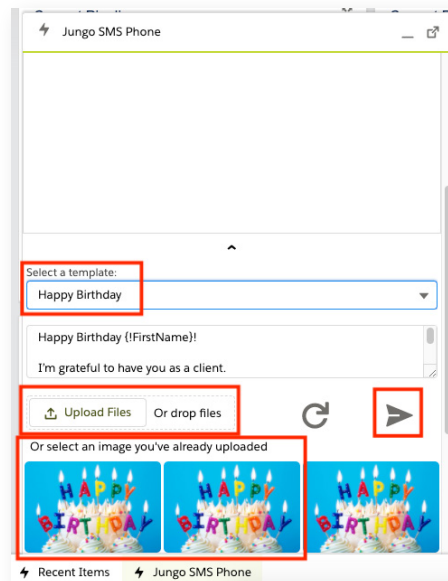
5. Select the phone number of the contact record you wish to begin a Jungo SMS conversation with. Click **Select**.



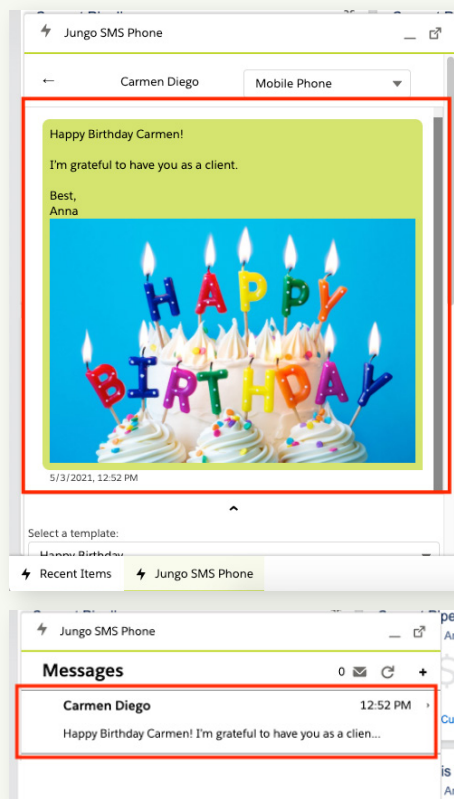
6. You can then begin the conversation using the text box towards the bottom.



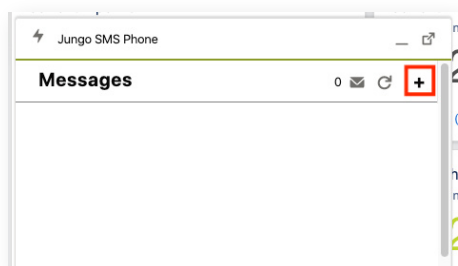
7. From here, you can select from a previously created SMS Template, type up a message using the text box, upload an image, or select from an image previously uploaded. Then click **Send**.



8. All inbound and outbound SMS History for this particular conversation will then be displayed here in the Jungo SMS Phone.

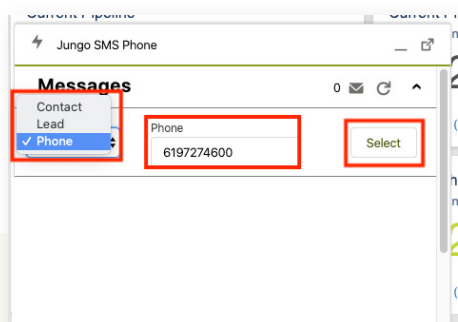


9. In addition to sending SMS messages to contacts saved in your Jungo account, you can also use the Jungo SMS Phone to send SMS messages to an unsaved contact. First, select the **plus sign (+)** from the upper right-hand corner of the Jungo SMS Mobile Phone component.

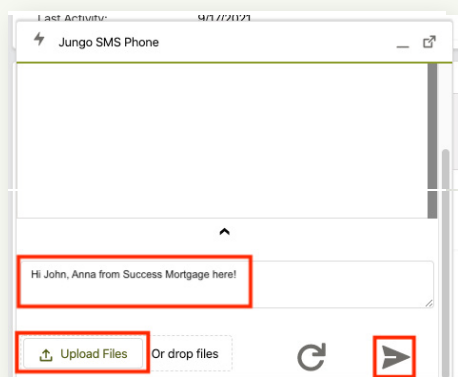


10. Then choose **Phone** and type in the phone number of the unsaved contact. Click **Select**.

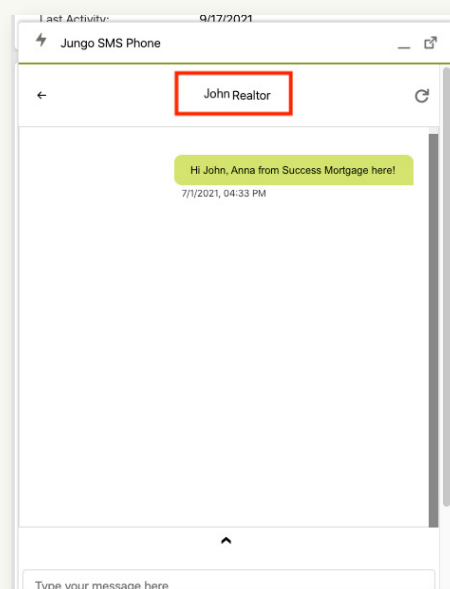
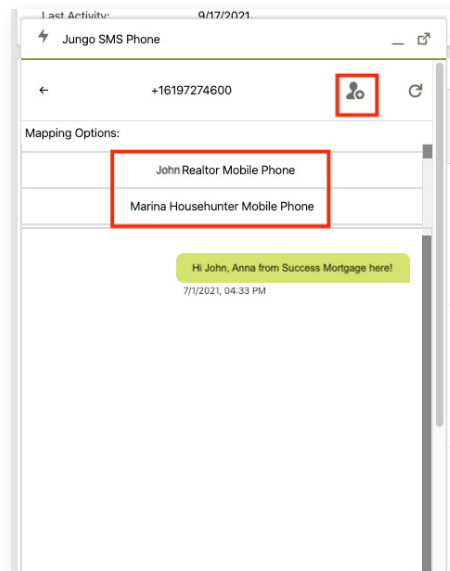
Note: The phone number must be in one of these two formats: XXX-XXX-XXXX or XXXXXXXXXX.

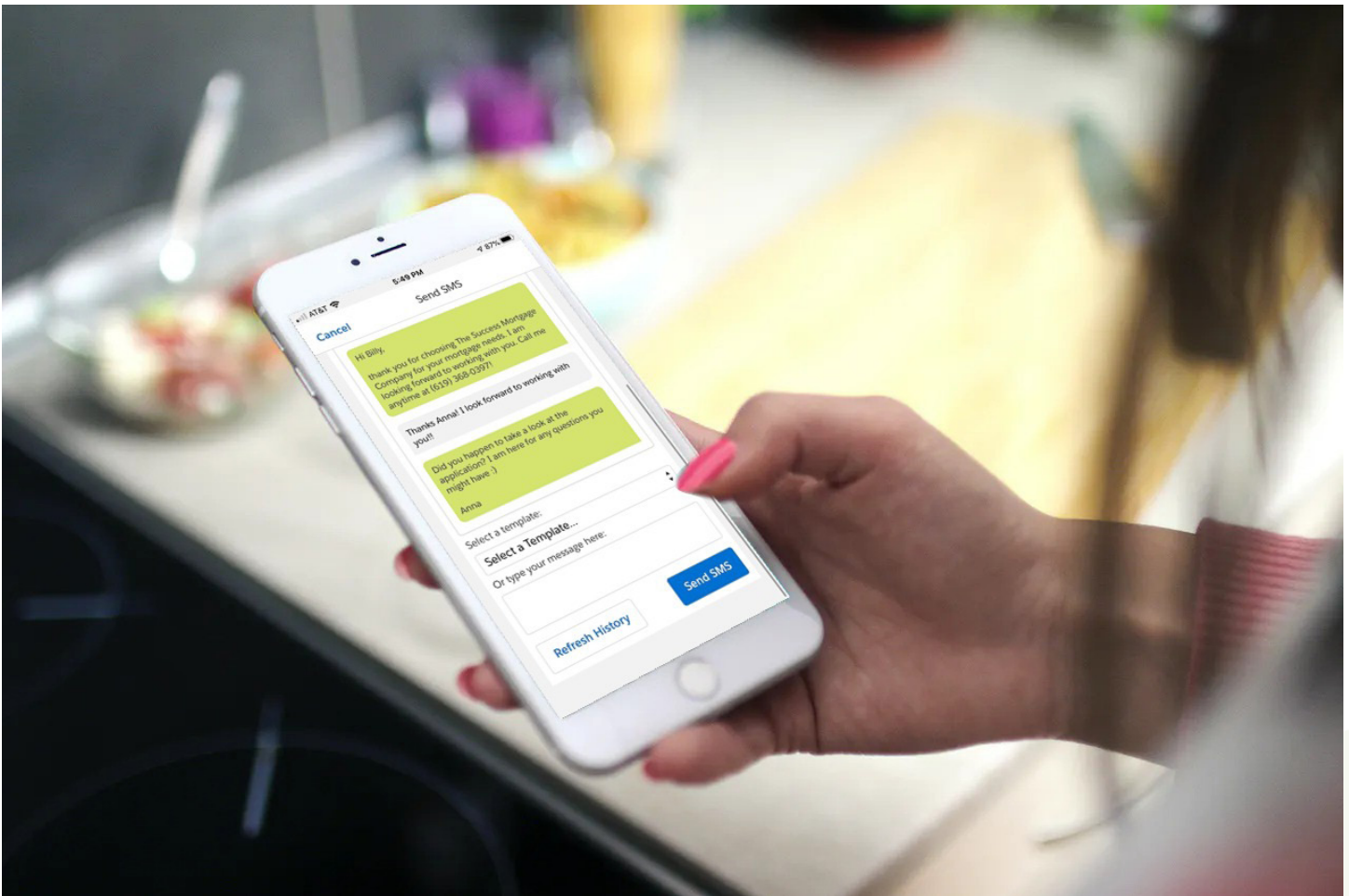


11. Type up your quick message, upload a photo if you'd like, and click on the Paper Airplane to send your message.



12. After the contact has been added to your Jungo account, you can link this SMS conversation to their contact record by clicking the **Add Contact** symbol in the upper right-hand corner. From there you will find a list of contacts with a matching phone number to choose from. Selecting one of the names will then link this SMS conversation to their contact record.





PLEASE NOTE: Your use will be subject to your SMS carrier's terms of permitted use. Please review and follow your SMS carrier's guidelines and best practices.

When sending any kind of mass or auto SMS messages, you must include "REPLY STOP TO OPT-OUT" at the end of the messages.

Also, just like when sending mass emails, don't use phrases such that would tag your email as "spam." Your SMS will also be tagged as spam and may be banned.

Jungo doesn't control these guidelines. Restrictions will apply across the US and Canada. We are not responsible for consequences of non-compliance with SMS carriers' requirements. We cannot provide for any refunds associated with SMS carrier decisions or changes in requirements or acceptable use.