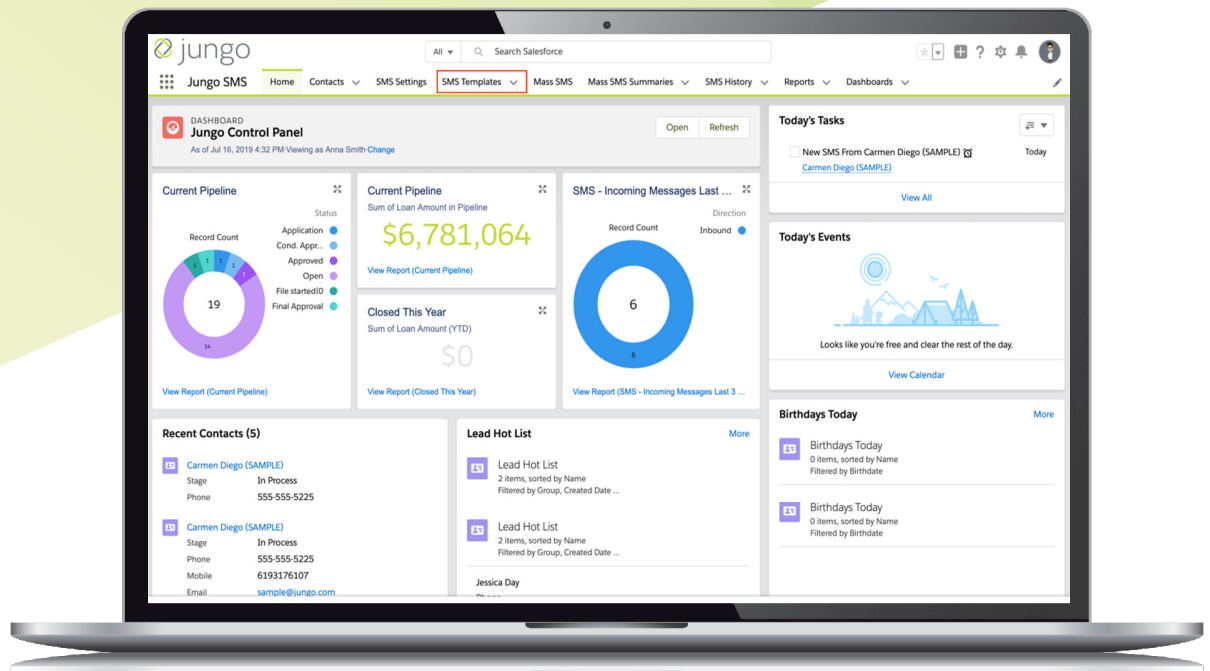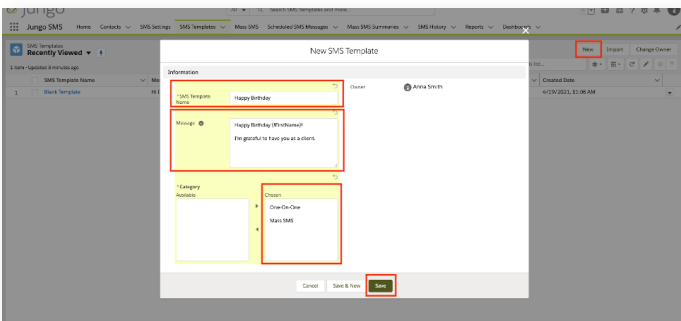# jungo

JUNGO SMS USER GUIDE 2

SMS Templates and Sending Images

jungo

Create an SMS template

1. From within Jungo SMS, click on the SMS Templates tab.

2. Click **New** in the upper right-hand corner. Give your Template a **Name**, type out your message, and categorize the template as both a **One-on-One** template and a **Mass SMS** template.

3. You can include **Merge Fields** (the bracketed information shown above) to pull information into the template from different places in Jungo such as the contact's first name.

   HERE ARE A FEW EXAMPLES:

   • Happy Holidays {!FirstName}! Wishing you and your loved ones the very best this Holiday Season!

   • Thank you {MtgPlanner_CRM__Referred_By_First Name__c} for referring {!FirstName} {!LastName} to me! Your referrals are always appreciated.

Check out the article below for a list of available fields to use for SMS Templates, as well as some additional examples of SMS Templates. https://jungo.force.com/s/article/Jungo-SMS-Templates

Note: If you have added a signature to your SMS Settings, you will not need to add a signature to any templates as it will be automatically added to the bottom of all outbound SMS messages.
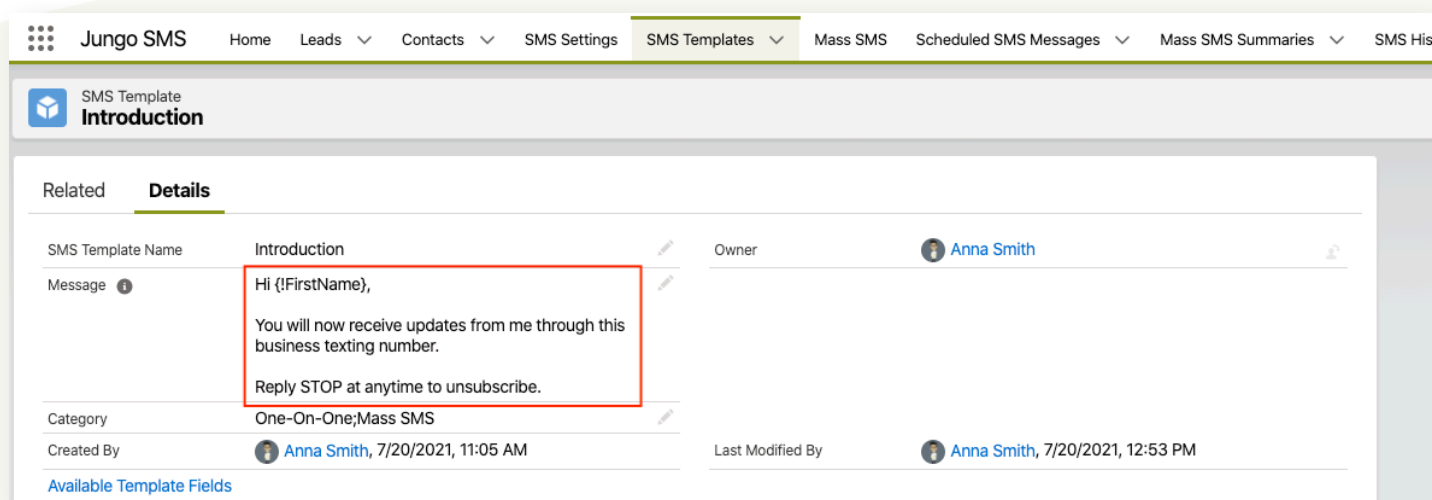
4. Click **Save** and your new SMS template will be displayed.
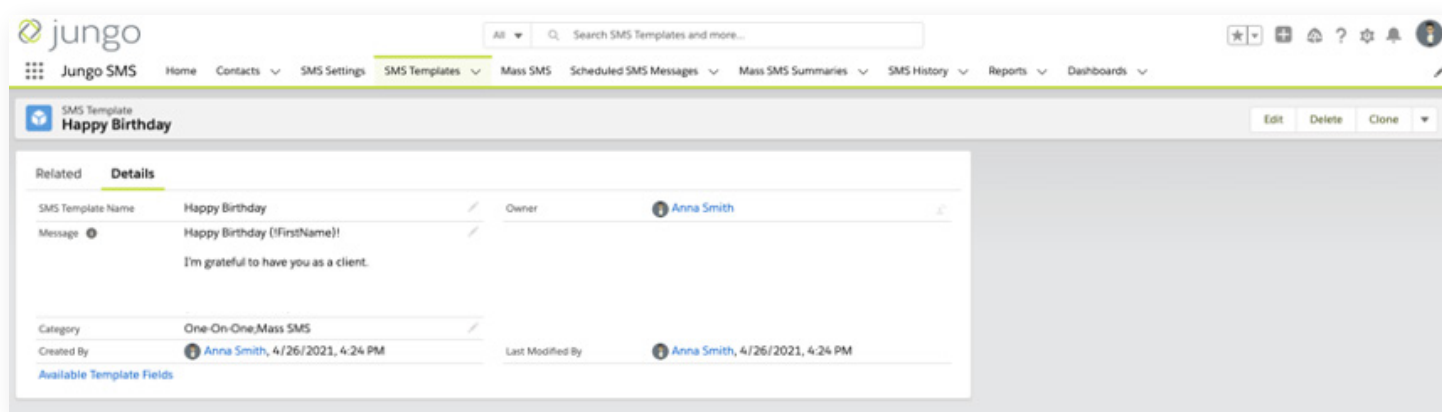
5. All of your Jungo SMS templates will be stored here under the SMS Templates tab. You can even create List Views using filters to organize templates as needed.
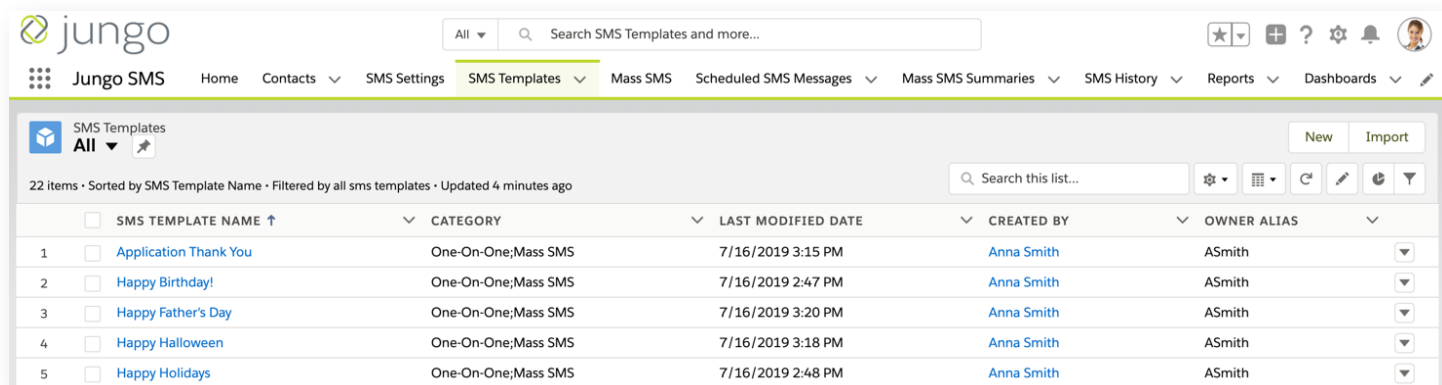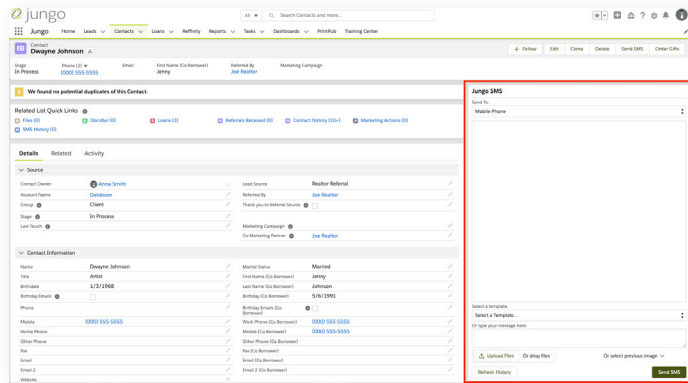

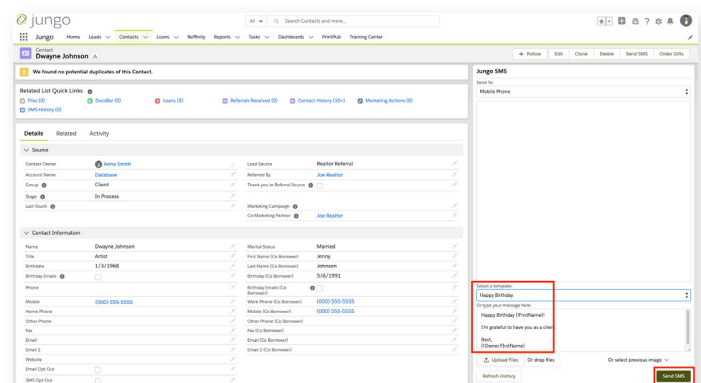6. Jungo SMS also comes equipped with an Introductory template to help ensure compliance.

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.
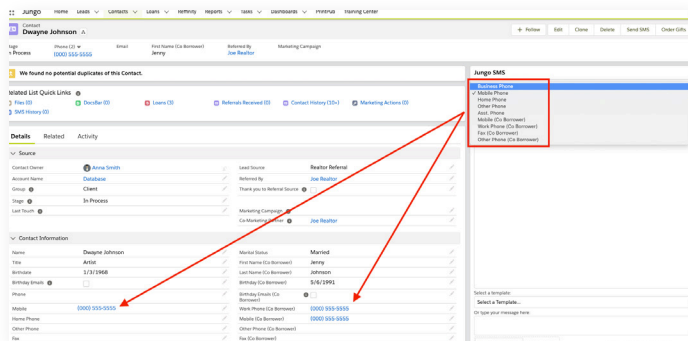
Send an SMS Template from a Contact Page

1. To use your newly created SMS Templates, first navigate to a contact record and find your Jungo SMS component.
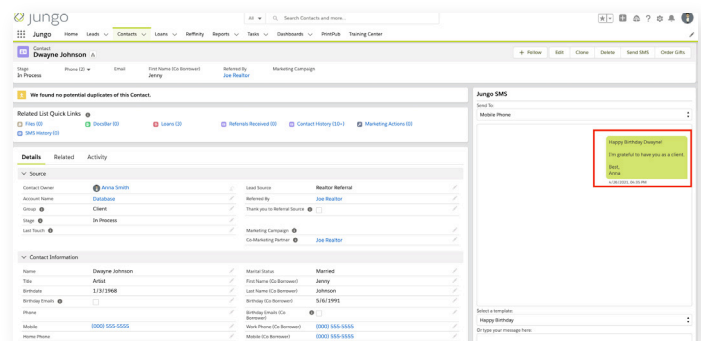

2. Select the phone number field on the contact page that you would like to send the SMS message to.

3. Select the SMS Template from the picklist that you would like to send.

4. Your template will populate in the text box below. Then click **Send SMS**.

5. Your message has now been sent! You can then view all SMS History with this contact in the Jungo SMS component.
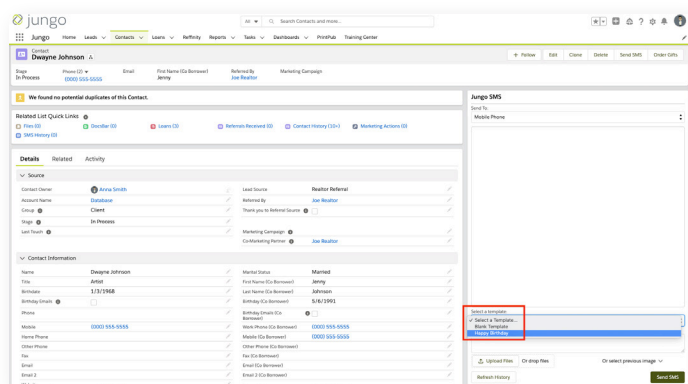
Send an image from a Contact Record

1. You also can send images to your contacts with Jungo SMS. You can either upload a new image or select from an image that was uploaded previously.

2. Selecting the **Previous Image** dropdown will expand a list of the 9 most recent uploaded images from within the last week. You can also drag and drop an image to upload or browse from an image saved on your computer.

3. Once you have selected your image, you can again choose your SMS Template, and click **Send SMS**.

4. Your message has now been sent! Again, you can then view all SMS History with this contact in the Jungo SMS component.

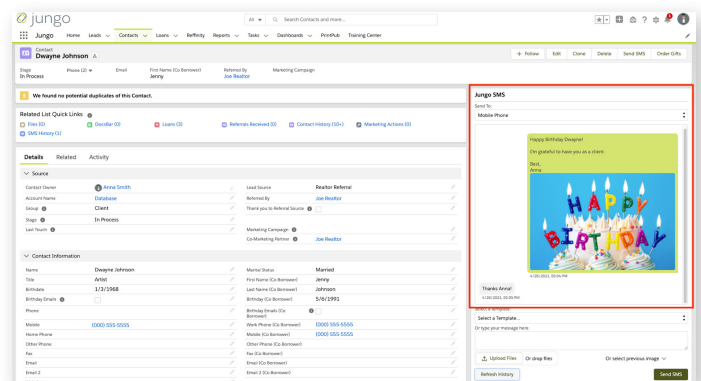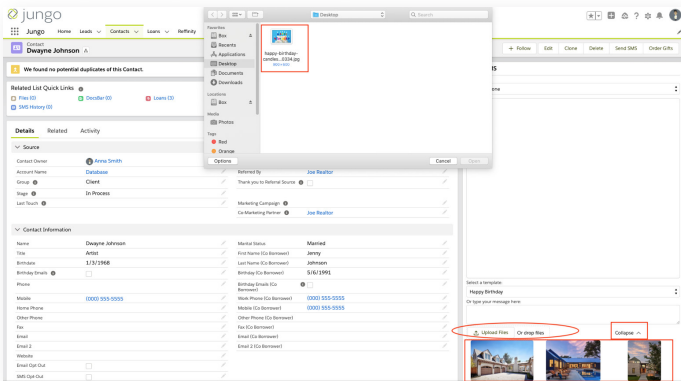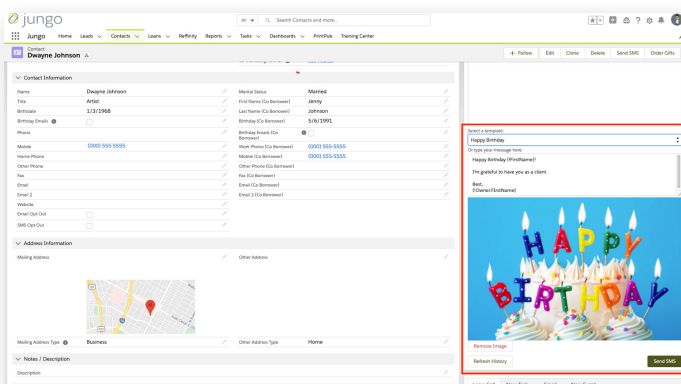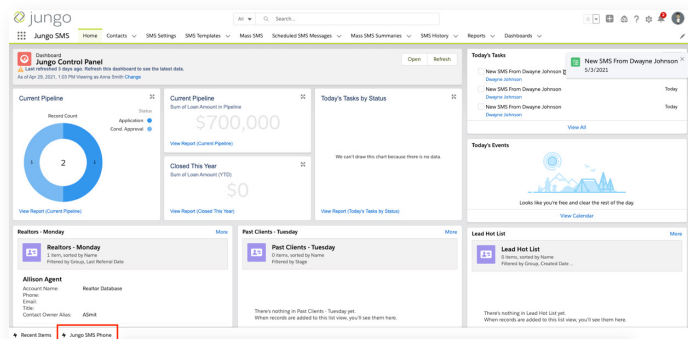# Sending SMS Template and Images
## with the Jungo SMS Phone

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.
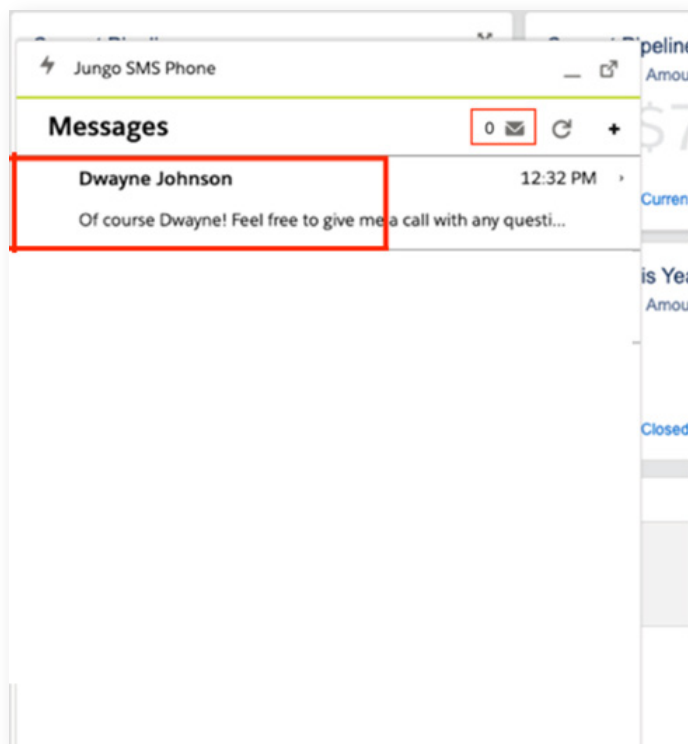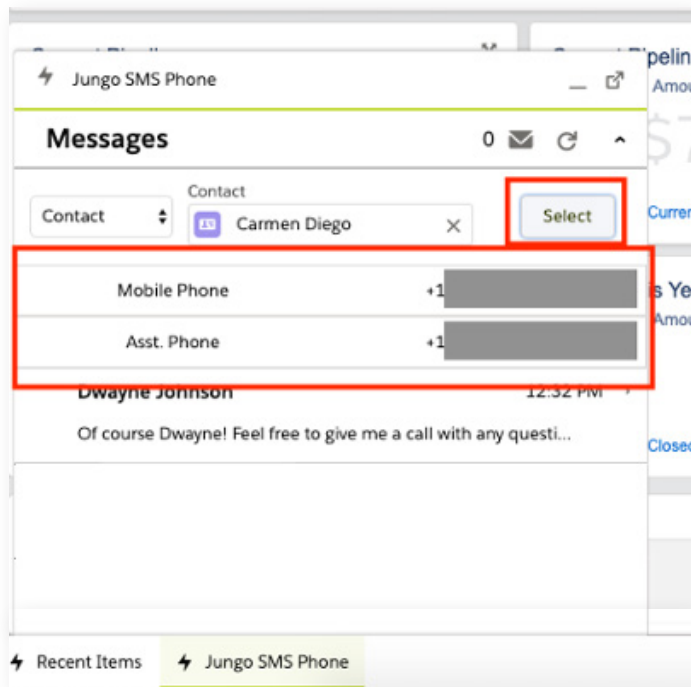

3. Clicking into a conversation you can view inbound and outbound SMS History.
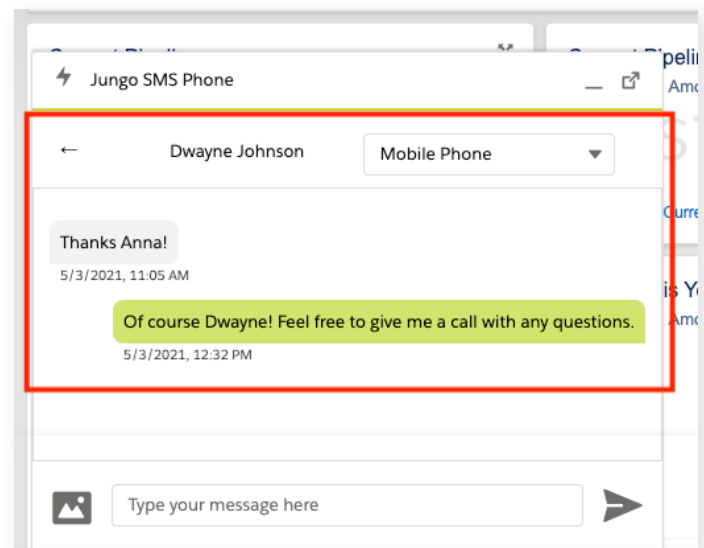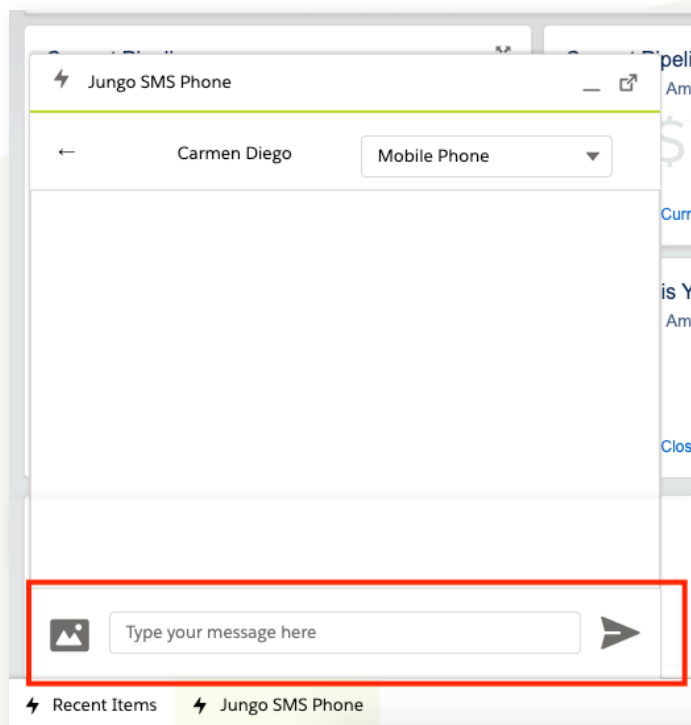

4. To start a new conversation, click on the **Plus (+)** button in the upper right-hand corner, from there you can search for the desired contact record, and click **Select**.
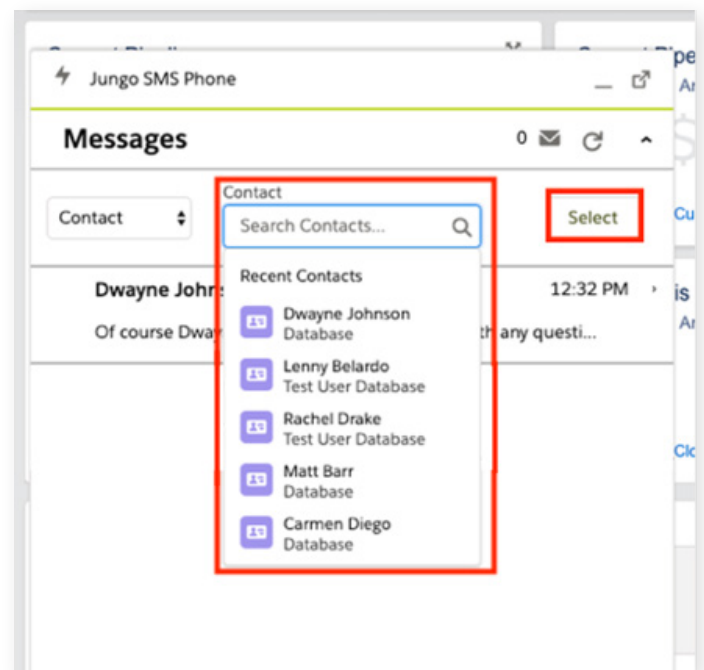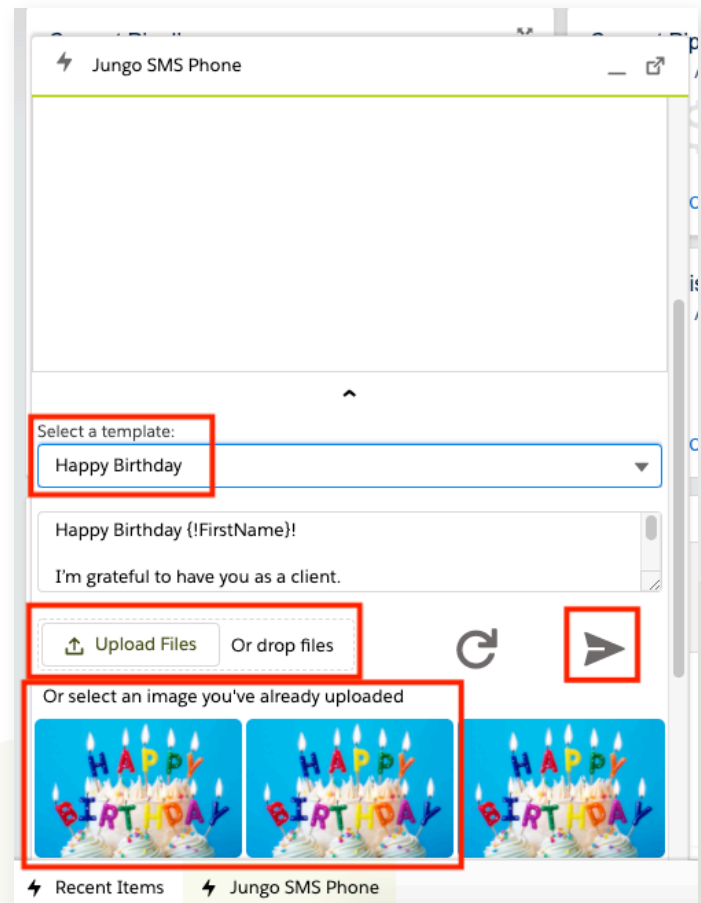
5. Select the phone number of the contact record you wish to begin a Jungo SMS conversation with. Click **Select**.

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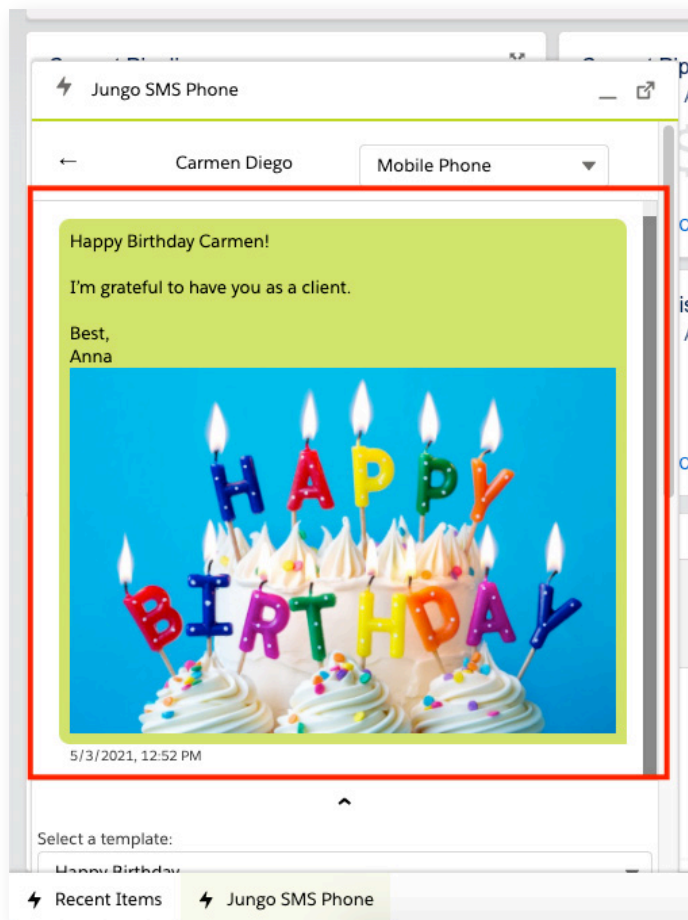

7. From here, you can select from a previously created SMS Template, type up a message using the text box, upload an image, or select from an image previously uploaded. Then click Send.

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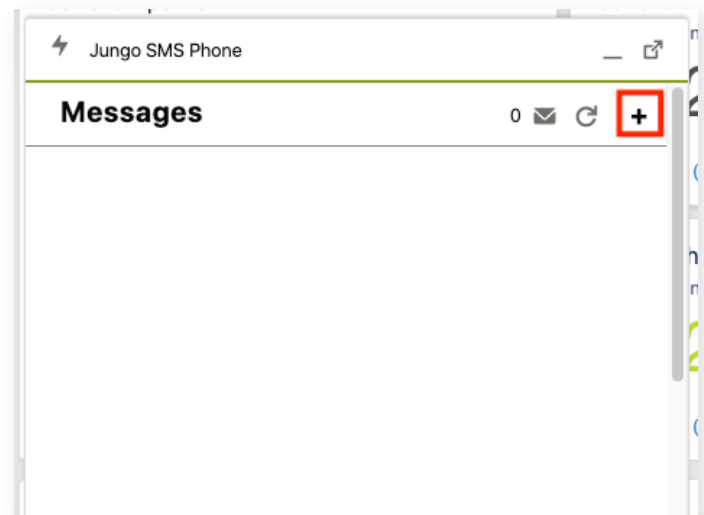
10. Then choose Phone and type in the phone number of the unsaved contact. Click Select.

Note: The phone number must be in one of these two formats: XXX-XXX-XXXX or XXXXXXXXXX.
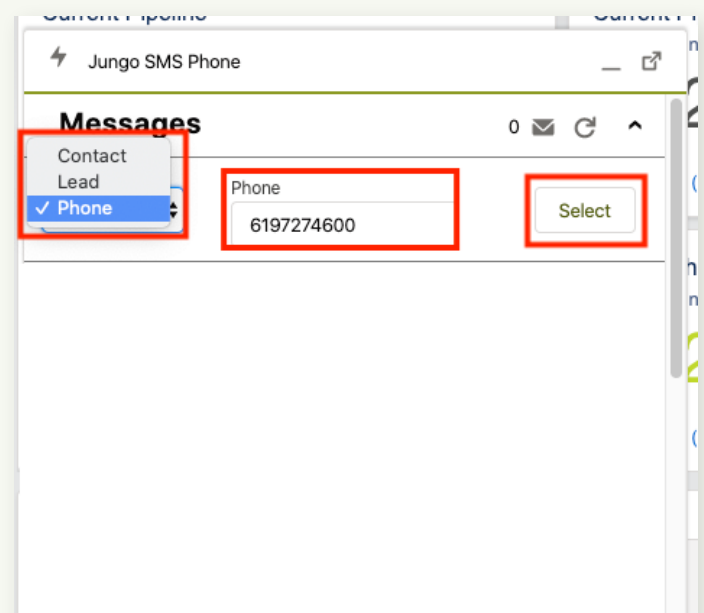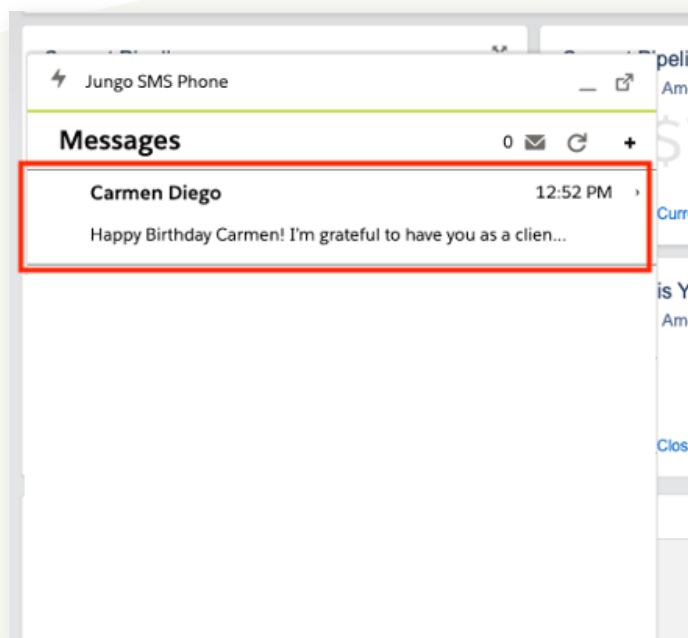
11. Type up your quick message, upload a photo if you'd like, and click on the Paper Airplane to send your message.

Note: SMS Templates are not available within the Jungo SMS phone when sending SMS messages to unsaved numbers. However, Jungo SMS users are still required to send the "Introduction Template" as their initial SMS message to anyone that they will be communicating with via SMS message.
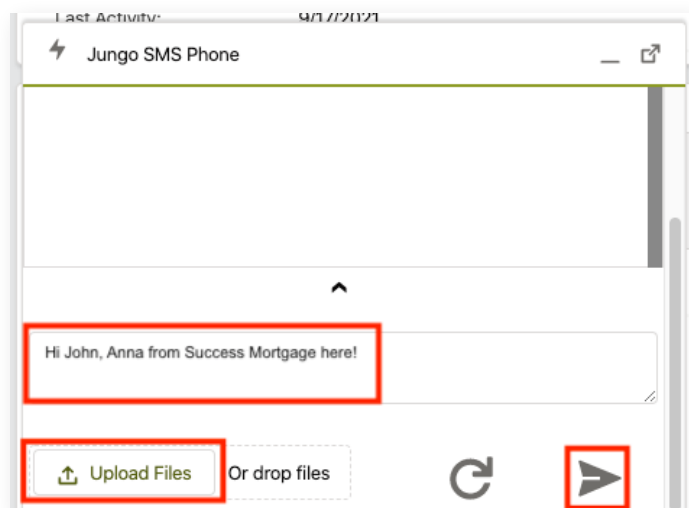
12. To use your Introduction Template, navigate back to your **SMS Templates** tab and copy your **Introduction template**.
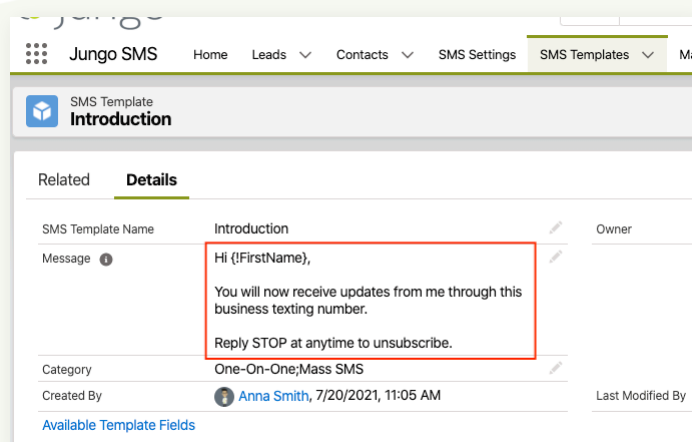
13. Paste the **Introduction Template** in the text box of your Jungo SMS Phone conversation and edit manually to include the individual's first name.
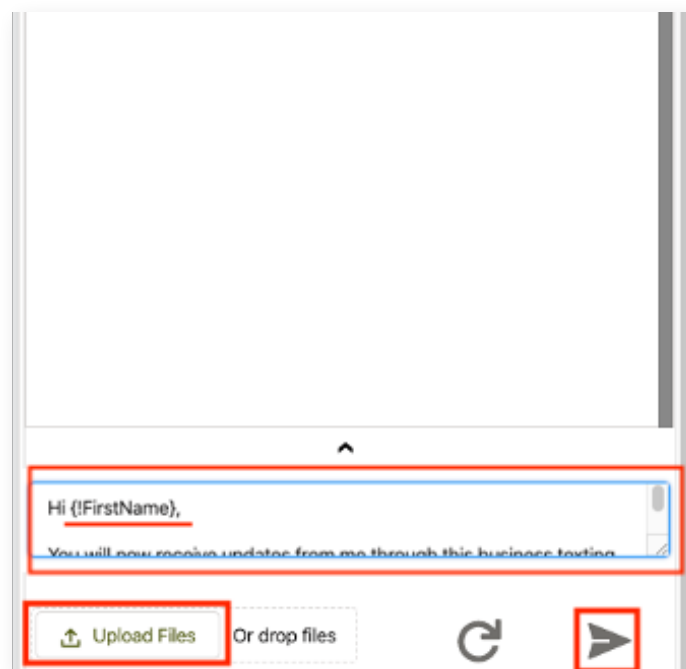
14. After the contact has been added to your Jungo account, you can link this SMS conversation to their contact record by clicking the **Add Contact** symbol in the upper right-hand corner. From there you will find a list of contacts with a matching phone number to choose from. Selecting one of the names will then link this SMS conversation to their contact record.

> Reminder: If you have added a signature to your SMS Settings, you will not need to add a signature to any templates as it will be automatically added to the bottom of all outbound SMS messages
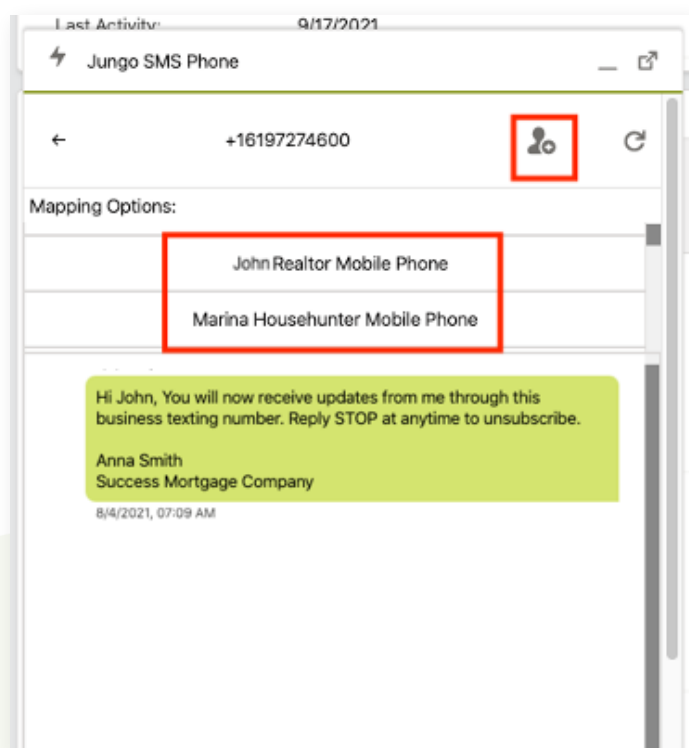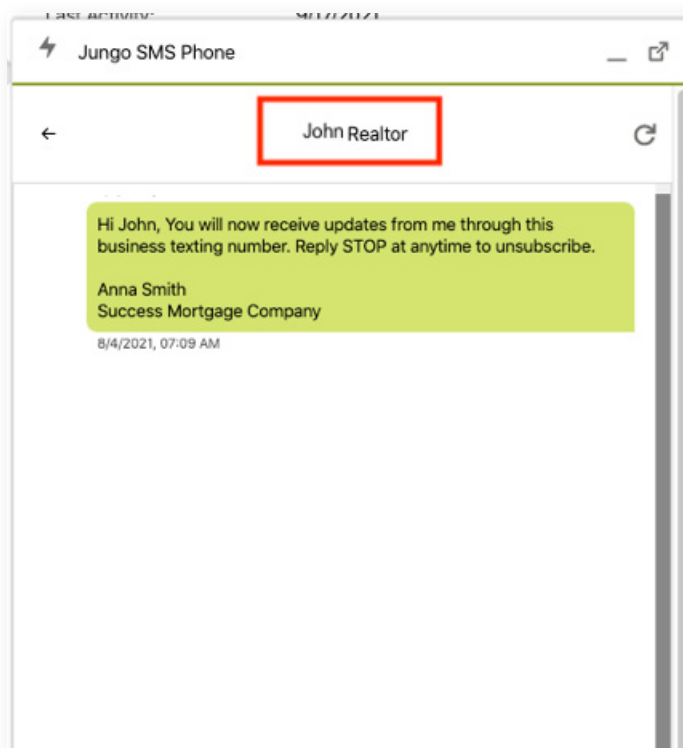
PLEASE NOTE: Your use will be subject to your SMS carrier's terms of permitted use. Please review and follow your SMS carrier's guidelines and best practices.

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.