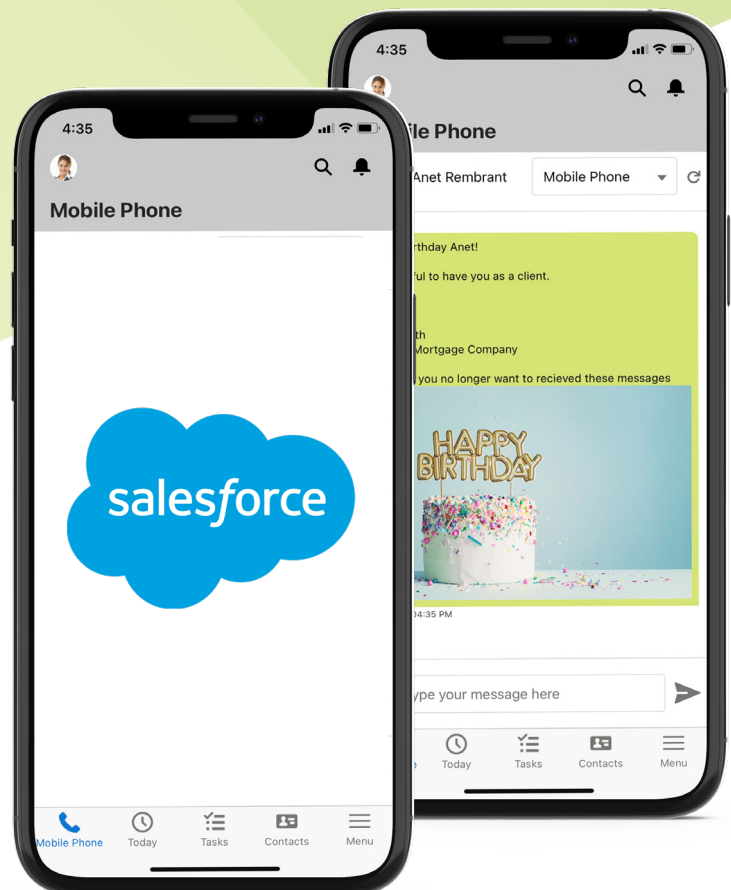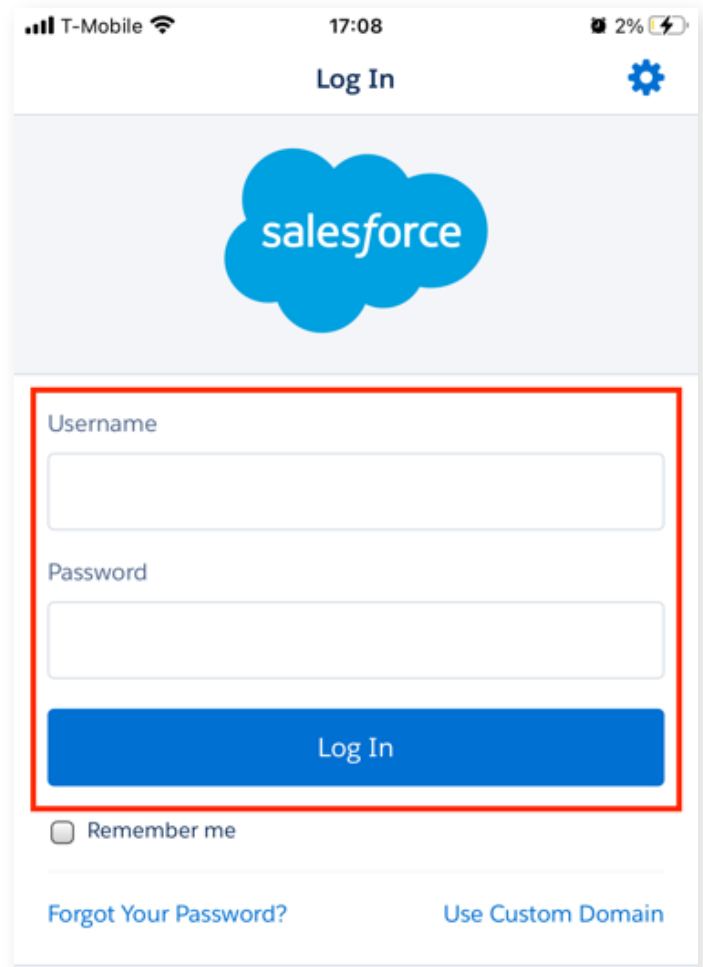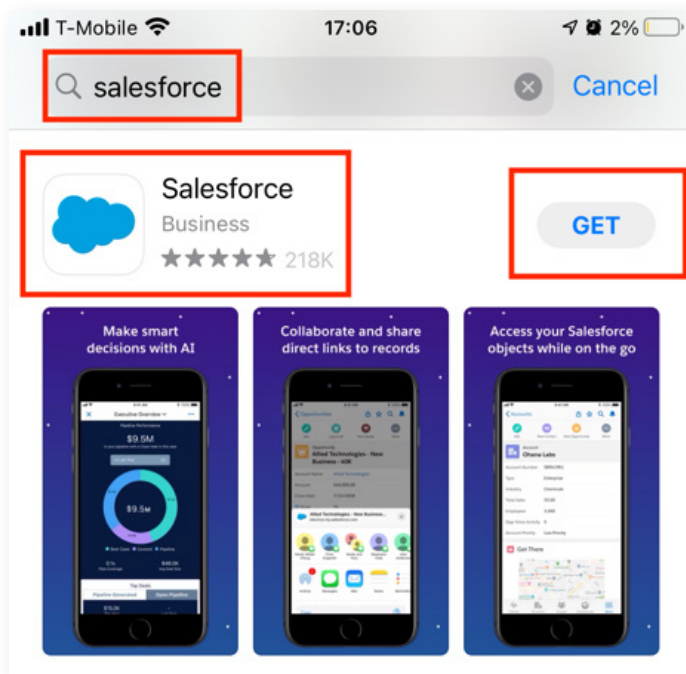# jungo

JUNGO SMS USER GUIDE 4

Jungo SMS in the Salesforce Mobile App

Download the Salesforce Mobile App

1. If you haven't already done so, download the Salesforce app from either the App Store or the Google Play Store.

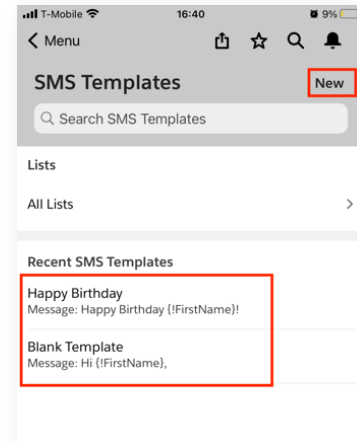2. Once downloaded, log in using your Jungo login credentials.

Creating an SMS template

1. Once logged in to the Salesforce Mobile App, select Menu from the lower right-hand corner and click **SMS Templates.**
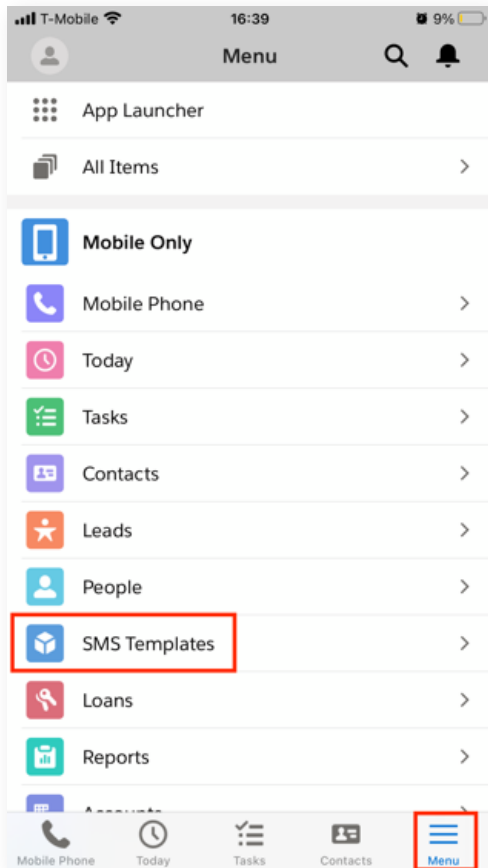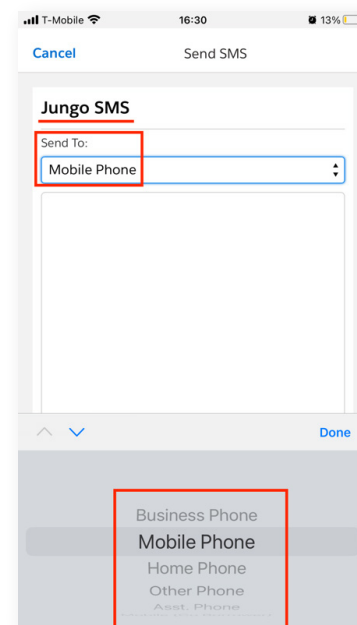

2. From this screen you can view any existing SMS Templates or create a new SMS Template by clicking **New** in the upper right-hand corner.

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

3. 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.
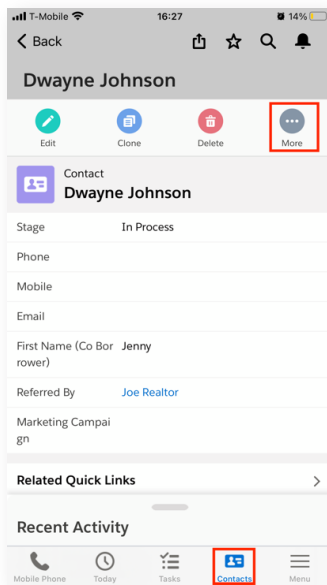
Note: If you have added a signature to your SMS Settings, you will not need to add a signature to any templates as it will be automatically added to the bottom of all outbound SMS messages.
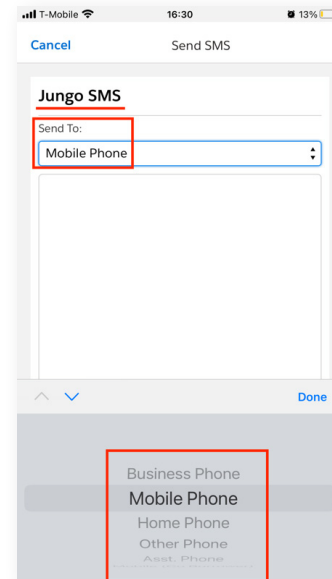
Sending an SMS Message
from the Contact Page

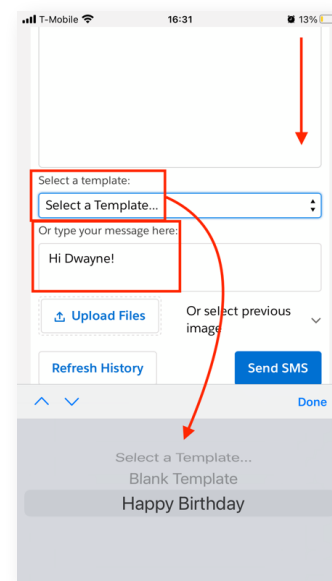1. To send an SMS message from the contact page, first select **Contacts**, then click **More**.

2. Select **Send SMS.**

3. Your Jungo SMS component will appear. Then select the phone number you would like to send the SMS message to.
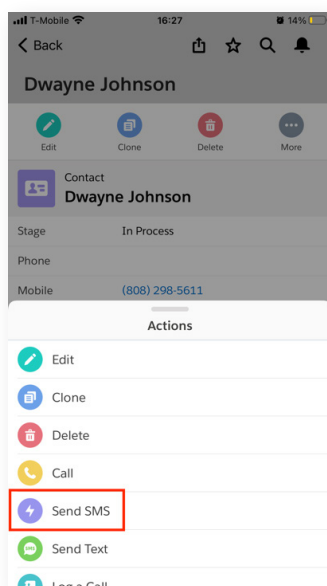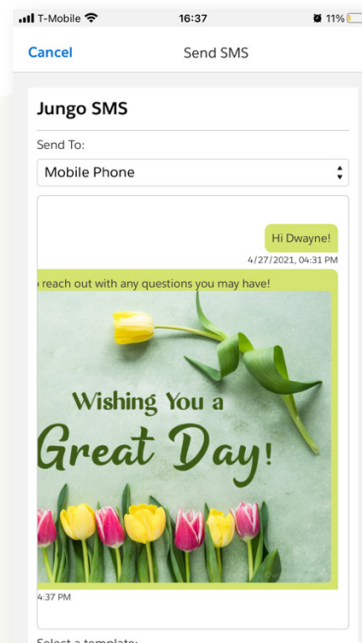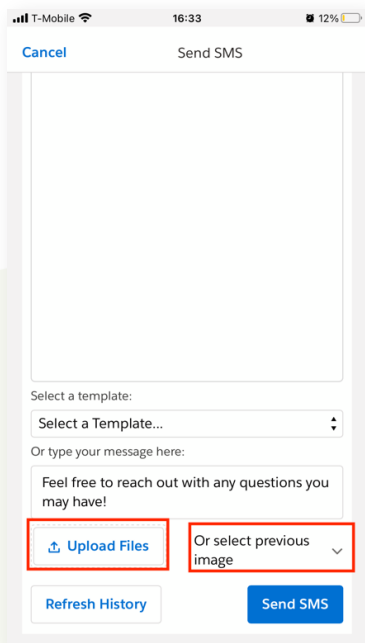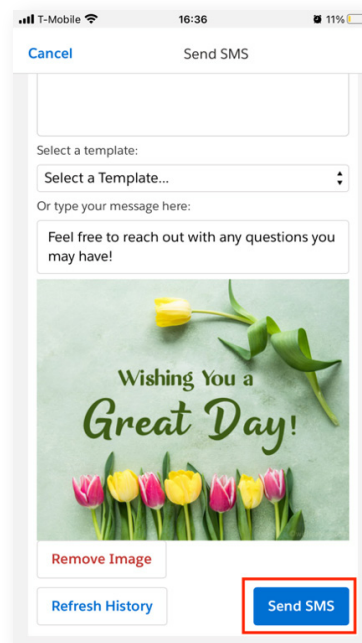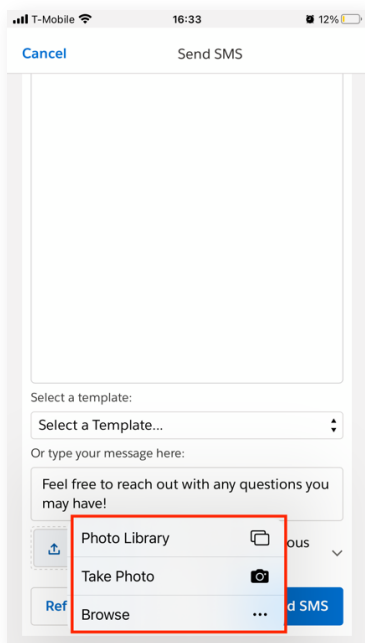

4. Scroll down and then you can either type up an SMS message or select from a previously created SMS Template.

5. Next, attach an image by selecting either **Upload Files or Select Previous Image**.

6. Finally, click **Send SMS** and scroll up on the page to display all inbound and outbound SMS History for this contact.
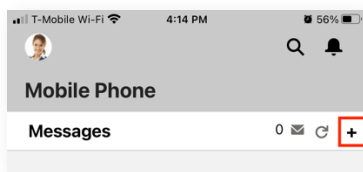
Using the Mobile Phone

1. You can also view several Jungo SMS conversations at a time under the **Mobile Phone**. To view this, select **Mobile Phone** in the lower left-hand corner.
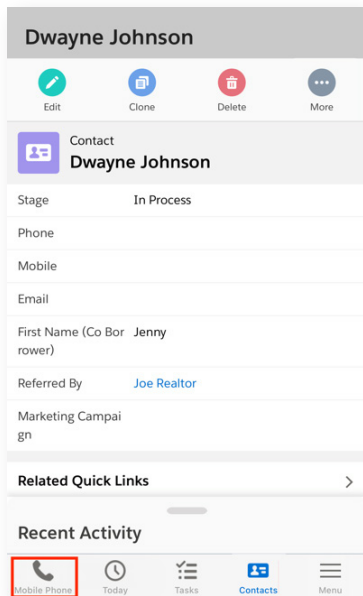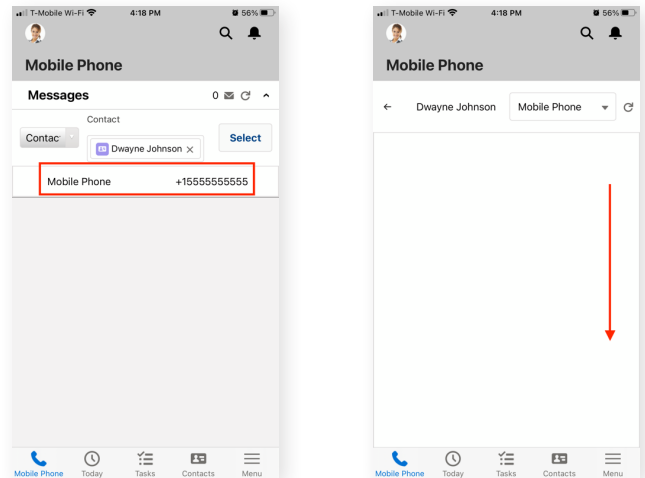
2. Click on the **Plus (+)** icon in the upper right-hand corner to add and SMS conversation to your Mobile Phone.
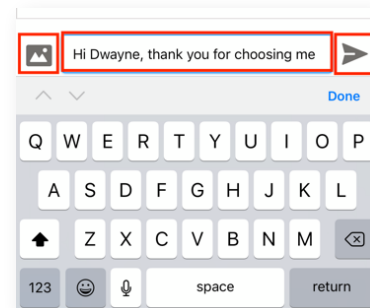
3. From the **Contact lookup**, search for the contact you'd like to add the SMS conversation for. Then click **Select**.
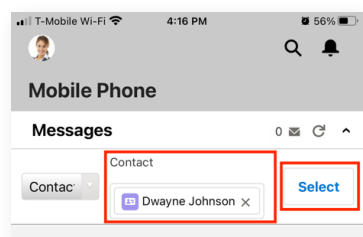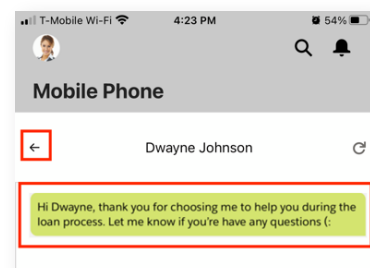
4. Select the phone number for the conversation you would like to display then scroll down to reveal the text box.

5. Type up your message and/or insert an image, and click **Send**.

6. Scroll up to view the SMS History for this particular SMS conversation. Click the Back button to view existing conversations or add a new conversation to the Mobile Phone.

Sending SMS Messages
to Unsaved Contacts

1. 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.
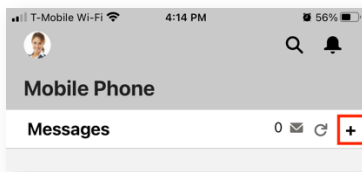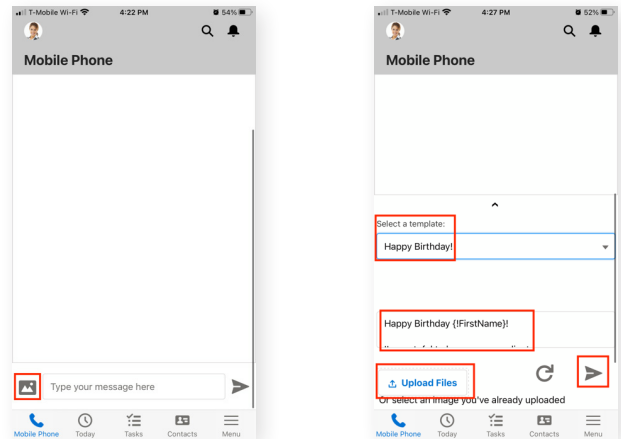
2. Then choose **Phone** and type in the phone number of the unsaved contact. Click **Start Conversation with_____**. Click **Select**.
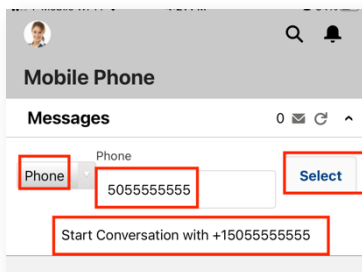
3. Scroll down to reveal the text box.
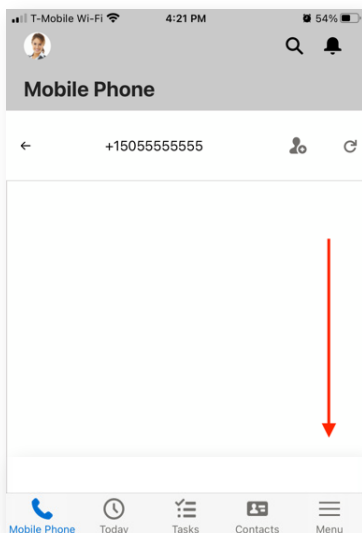
4. Type up a quick message, choose a template, and/or upload a photo the same way as when sending an image or choosing an SMS template directly from the contact page, and click on the Paper Airplane to send your message.
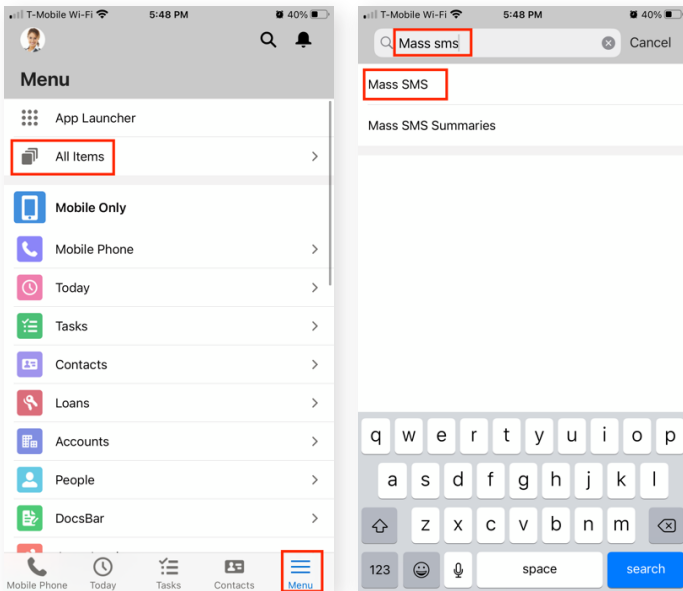
5. After the contact has been added to your Jungo account, you can link this SMS conversation to their contact record by clicking the **Add Contact** symbol in the upper right-hand corner. From there you will find a list of contacts with a matching phone number to choose from. Selecting one of the names will then link this SMS conversation to their contact record.
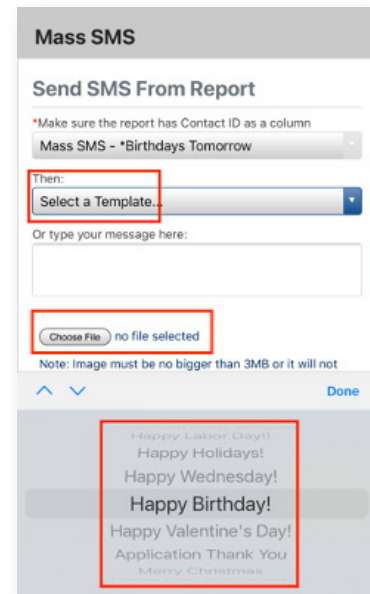
jungo
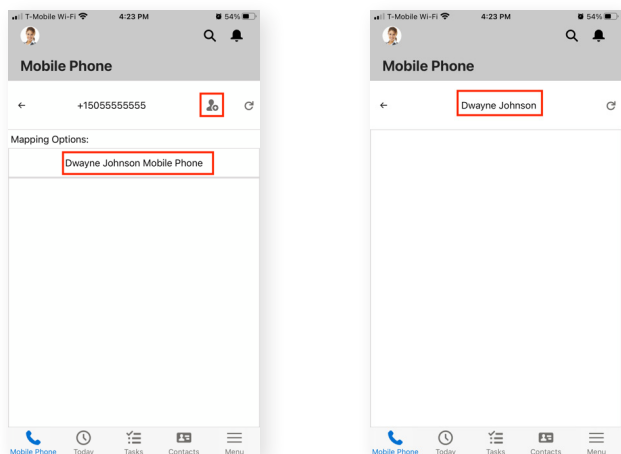
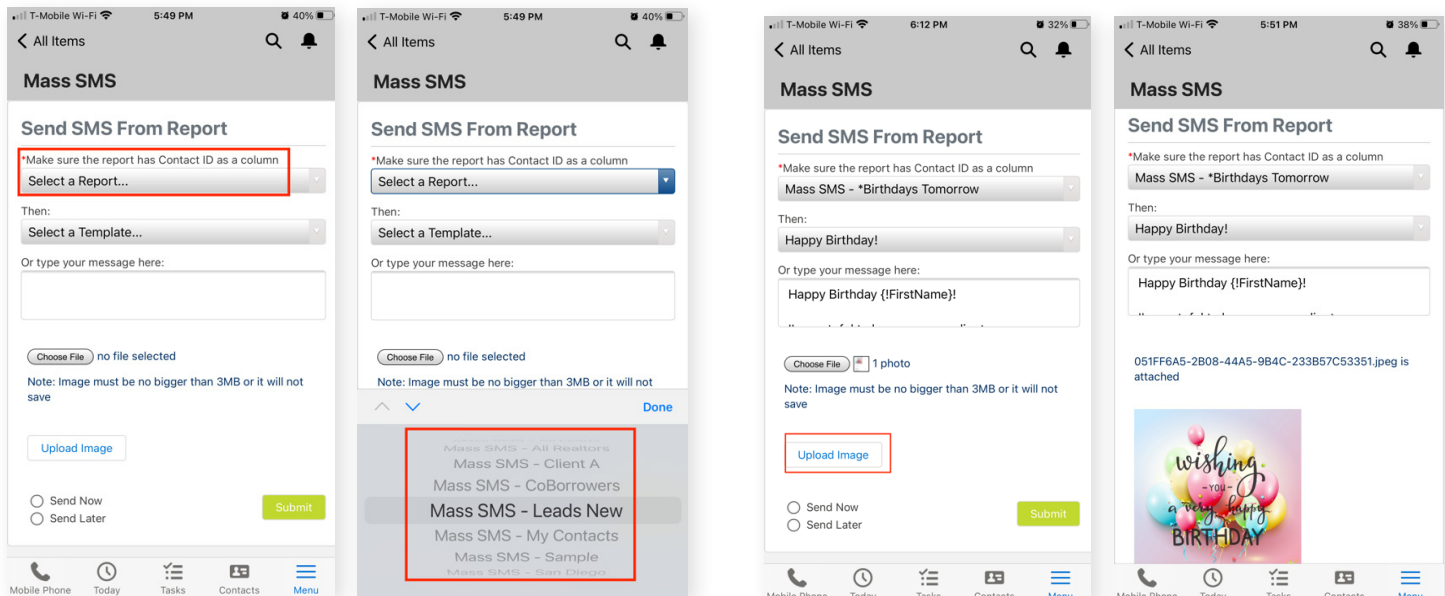# Sending Mass SMS Messages
from the Salesforce Mobile App

1. Select **Menu** and click **All Items**. Search for and click on **Mass SMS**.

2. Choose the report that you would like to send the mass SMS message to.

3. Next, select an **SMS Template** previously created, or type a new message in the provided text box. Choose to upload an image directly from your phone's camera or from your phone's photo library.

4. Finally, select to either send the Mass SMS message now, or schedule it to be sent at a later time. **Click Submit**, and the SMS message will be sent to all contacts in the selected report!
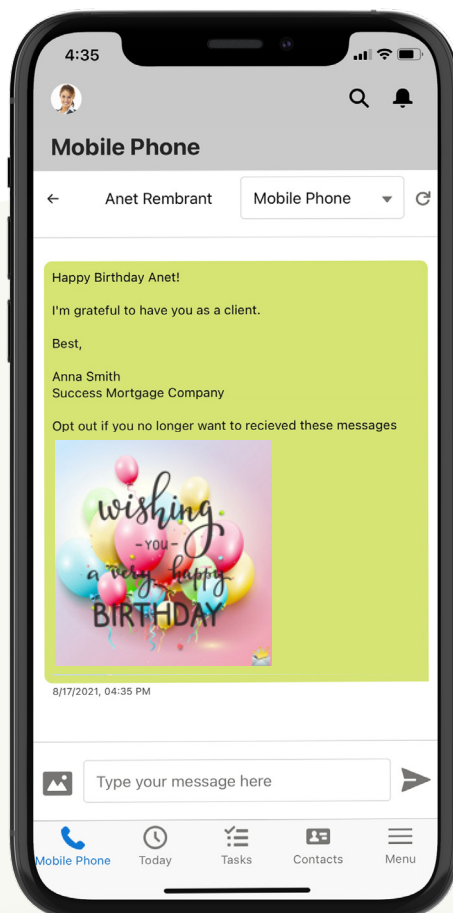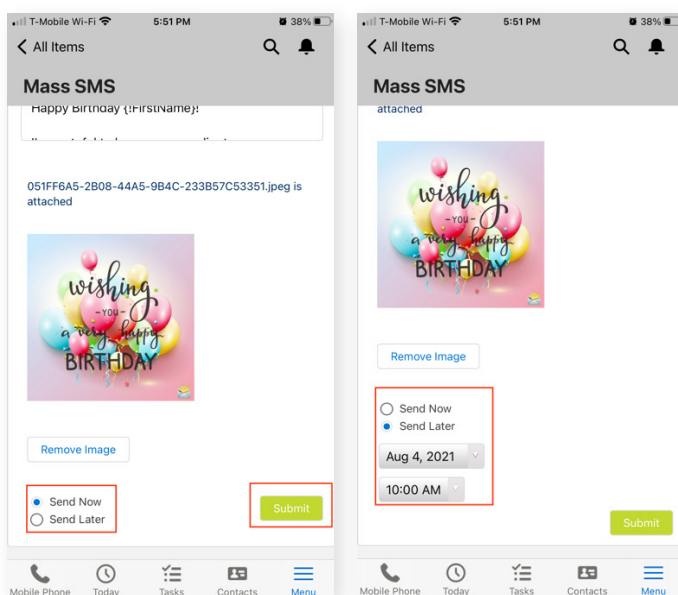
View SMS Dashboard

1. Finally, you can also view your SMS Dashboard from the Salesforce mobile device. To do so, click **Menu**, then scroll down and click on **Dashboards**.

2. Click on SMS Dashboard to open and view some helpful SMS metrics.
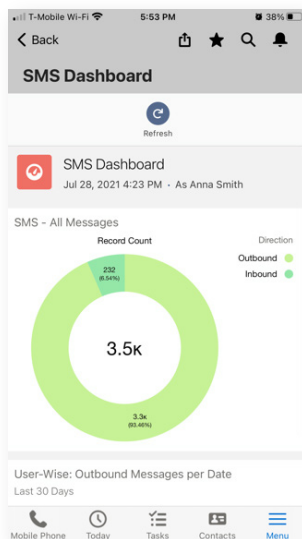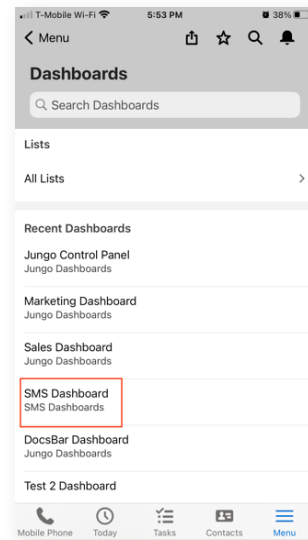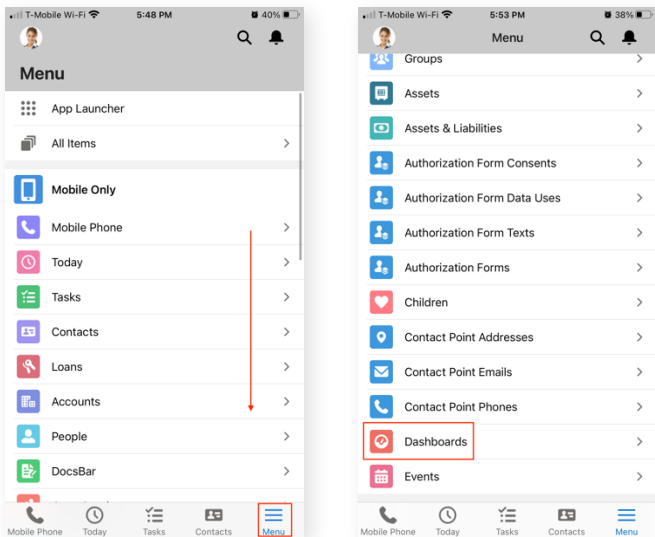
PLEASE NOTE: Your use will be subject to your SMS carrier's terms of permitted use. Please review and follow your SMS carrier's guidelines and best practices.

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.