

Start sending text messages (SMS)

1. To create and send a text message (or series of messages), go to the Conversation Manager

The screenshot shows the Dana Contact Center dashboard. At the top, there is a navigation bar with 'Knowledge Center', 'Support Chat', and 'Sign out'. The main header includes the Dana logo and a 'Welcome' message. The dashboard is divided into several sections:

- SEND COMMUNICATIONS:** A red circular icon with a plus sign and a document icon, with the text 'Click here to configure your email, call and sms communications.'
- MANAGE YOUR LISTS:** A red circular icon with a plus sign and a list icon, with the text 'Click here to manage your contact lists.'
- Quick Start:** Four buttons: 'Empty', 'Email', 'SMS', and 'Call'.
- Communications sent this month:** A table with columns: Canal, Standard, Premium, Total, and %.
- Report of Communications:** A bar chart showing data for 2020, with a legend for 'Total', 'Email', 'SMS', 'Call', and 'API'.
- Applications:** A grid of application tiles. The 'Conversation Manager' tile is highlighted with a red box.

Canal	Standard	Premium	Total	%
SMS	4	0	4	

2. Create a new Conversation

The screenshot shows the Dana Contact Center Conversation Manager interface. At the top, there is a navigation bar with 'Knowledge Center', 'Support Chat', and 'Sign out'. The main header includes the Dana logo and a 'Welcome, Venturesstars' message. The interface is divided into several sections:

- Home:** A dropdown menu with 'Conversation Manager' selected.
- My Conversations:** A list of conversation items. The first item has a green 'New Conversation' button highlighted with a red box. Other items have 'Send to Trash' and 'Move' options.
- Categories:** A list of categories including 'My Conversations (18)' and 'Manage Categories'.
- Latest activations:** A list of activation events. The first event is 'Prueba' with 1 contact, scheduled for 27-02-2020 at 15:24. The second event is 'prueba Mony mercantil panama...'.

3. Select the email channel or an empty conversation, name your conversation and select your contact list or just skip that step and click on create.

← New conversation

Select a conversation model:



Not selected

Select a contact list:

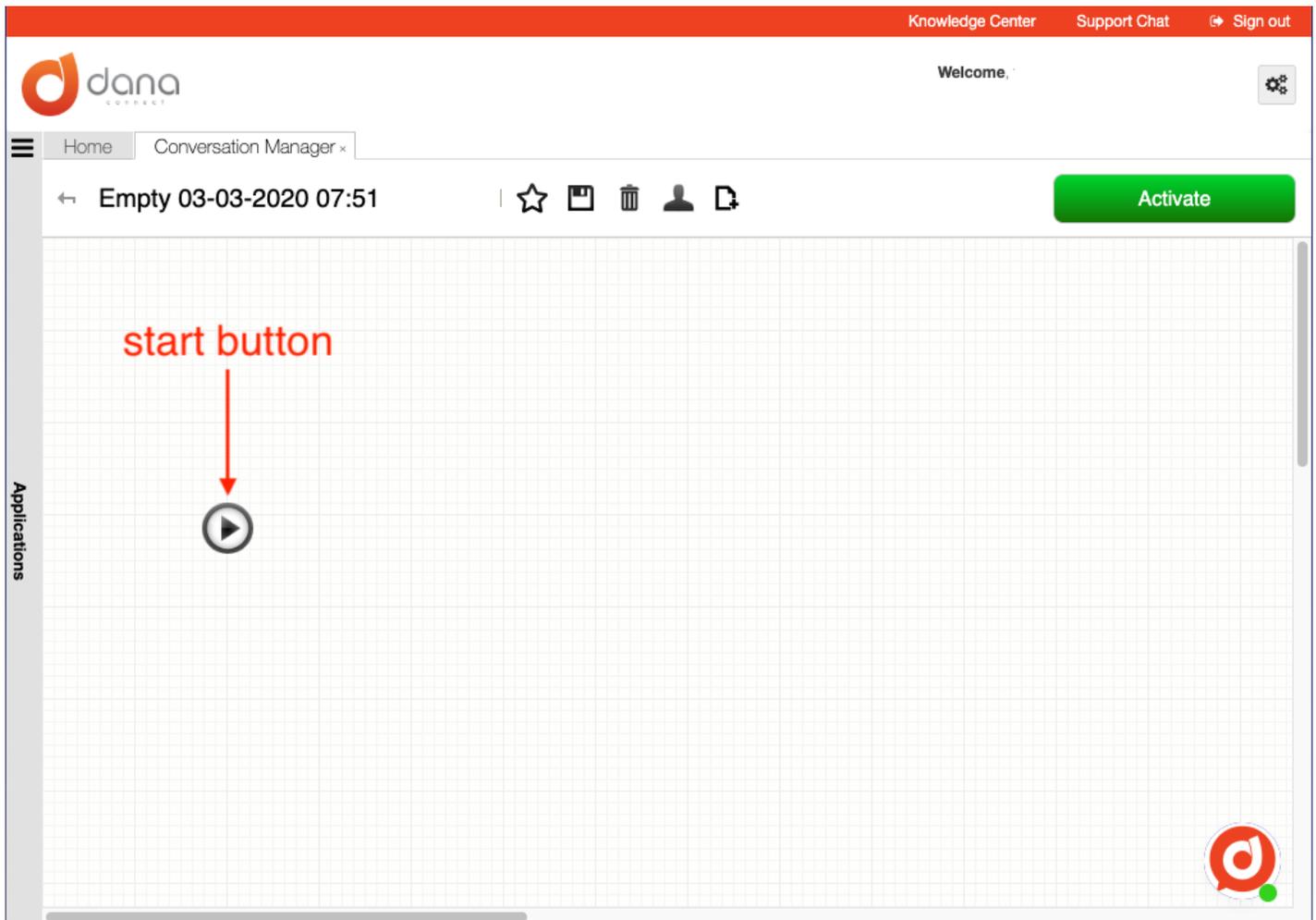
Select later Select now

Not selected

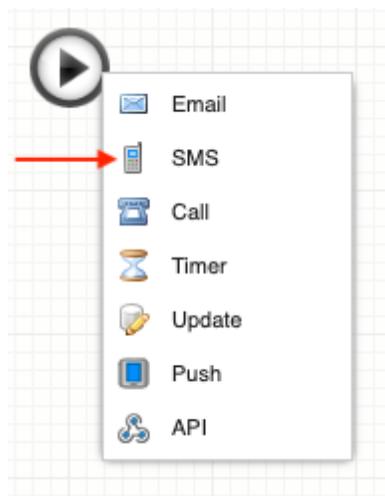
Name:

Create

4. Click on the start button and the node selection window appears



5. Add an SMS Node to your conversation



6. You have now a new SMS Node called New Step. Double click on the New Step and the SMS Editor window appears.



7. Add content to your SMS by writing, copy/pasting or selecting a template.

-  You can add dynamic content pulled from the contact list with labels inserted in your message to personalize it. See [How to add dynamic content to a message](#)

SMS

Name of Step:
New Step

Triggers:
 External URL
 Enable Short URL

Send Priority:
Basic

Custom Remitent:
Without custom remitent

Message Content | **Rich Content**

Insert Label | Template | Send to Contact | Quantity of Characters: 0 of 159 | Special Tags

[Write your text here]

Copy | Paste | Close | Save

i Leave the priority on Basic. High priority SMS are usually more expensive than Basic priority, it should only be selected to high, for messages that have to be delivered instantly, like transactional SMS.

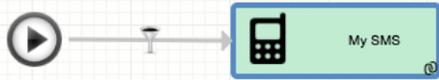
8. Close the SMS node when you're done editing and click on Activate



Reports

Activate

Applications



9. Click on "Select" to select the Contact List to which you want to send the message(s) to.



← Activation

Contact list:

 **Name:** Not selected
Number of contacts: Not selected contacts

Conversation Service Type:

 **Service:**
Mercadeo

Activation date and time:

 **Activation date:**
Immediate sending

10. Select the contact list you want to use for this communication

← Activation

Contact list:



Name: Not selected
Number of contacts: Not selected contacts

Conversion

Activation

Contact list				
Category	Name	Segment	Total	Details
All	My Customers 1	All contacts	17695	Explore
All	My Customers 2	All contacts	113695	Explore
All	My Customers 3	All contacts	25323	Explore
All	My Customers 4	All contacts	35423	Explore
All	My Contact list 1	All contacts	26415	Explore
All	Segmented by region 1	Region 1	44241	Explore
All	My Contact list 2	All contacts	34557	Explore
All	My Contact list 3	All contacts	23534	Explore
All	Segmented by region 2	Region 2	56462	Explore
All	Segmented by region 3	Region 3	23411	Explore

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Activate

11. The system will try to make an automatic mapping of the fields that have similar names.

Label equivalence:

1- [SMS] My SMS (2 Items)		Preview
name	Name	▼
Phone	Phone	▼

The fields on the **left column** are the ones you are using in your messages, and the fields on the **right column** correspond to fields in the contact list you have selected. In some cases, the system wouldn't find an equivalence in the names, so you have to make the mapping manually.

Label equivalence:



1- [SMS] SMS (2 Items) Preview

customer_name	Name	▼
Telefono	Not set	▼

12. Select the type of service for your Conversation. In most cases the type of communication is Marketing, but it could be Transactional communications, Billings, Mandatory communications, etc.

Conversation Service Type:



Service:

Marketing ▼

13. Select the date and time of activation. The most used is Immediate Sending, but you can activate also by programming a future date and time, periodically or by a Webservice (Webservice activation is recommended for advanced users).

Activation date and time:



Activation date:

- Immediate sending ▼
- Immediate sending
- Specific Date and Time
- Web service
- Monday through Friday
- Tuesday and Thursday
- Monday, Wednesday and Friday
- Everyday
- First day of the month
- First Monday of the month
- Every Monday
- Every Tuesday
- Every Wednesday
- Every Thursday
- Every Friday

14. Click on the Activate green button at the bottom of the page

The screenshot shows the Dana Conversation Manager interface. At the top, there is a navigation bar with "Knowledge Center", "Support Chat", and "Sign out" links. The Dana logo is on the left, and "Welcome," is on the right. Below the navigation bar, there is a breadcrumb trail: "Home" > "Conversation Manager". The main content area is titled "Activation" and contains several sections, each with a green checkmark icon:

- Contact list:** Name: My Contact List (All contacts), Number of contacts: 2674 contacts. Buttons: Change, Details.
- Label equivalence:** 1- [SMS] My SMS (2 Items). Preview button. Fields: name (Name), Phone (Phone).
- Conversation Service Type:** Service: Mercadeo.
- Activation date and time:** Activation date: Immediate sending.

At the bottom center, there is a prominent green "Activate" button, which is highlighted with a red rectangular box. In the bottom right corner, there is a circular Dana logo.

15. You get an activation confirmation with the information abstract of your conversation. Click on Send to confirm the activation.

Activation

Activation confirmation

Conversation: My Conversation

Contact list: My Contact List

Segment name: All contacts

Contacts: 23452 contacts

Steps

 1 element

Date: Immediate sending

 Close  Send

16. Your conversation is active now and you see the live reports window. The report will show you more data as time passes and your contacts interact with the SMS message.