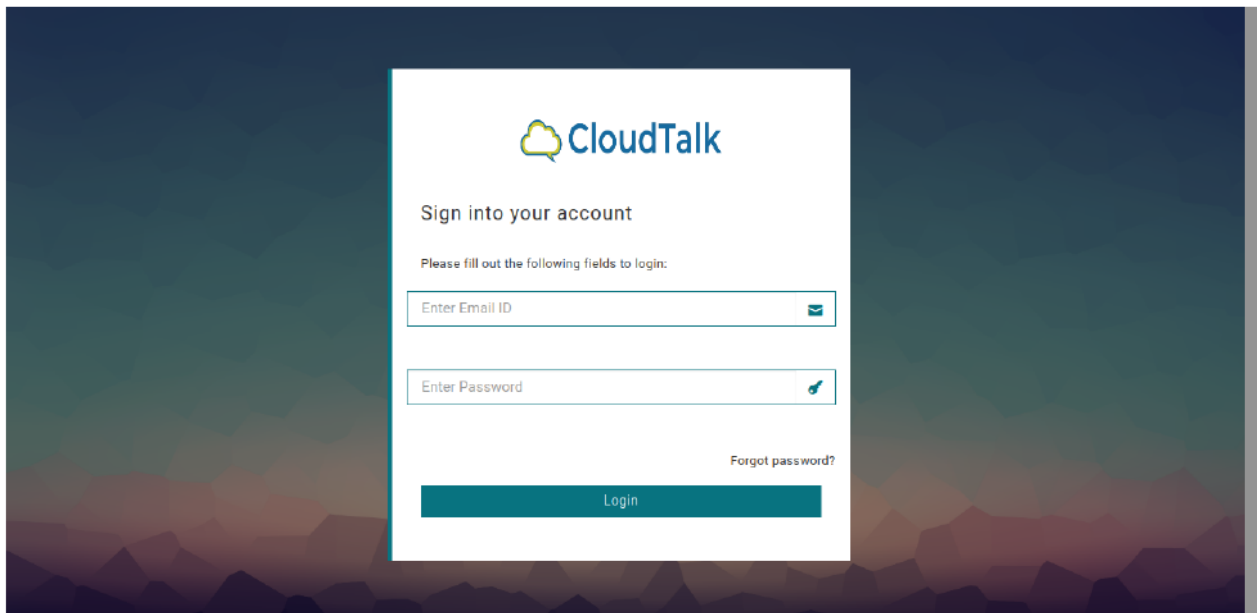




Cloud Talk SMS User Manual

Quick Guide to use your CloudTalk SMSAccount

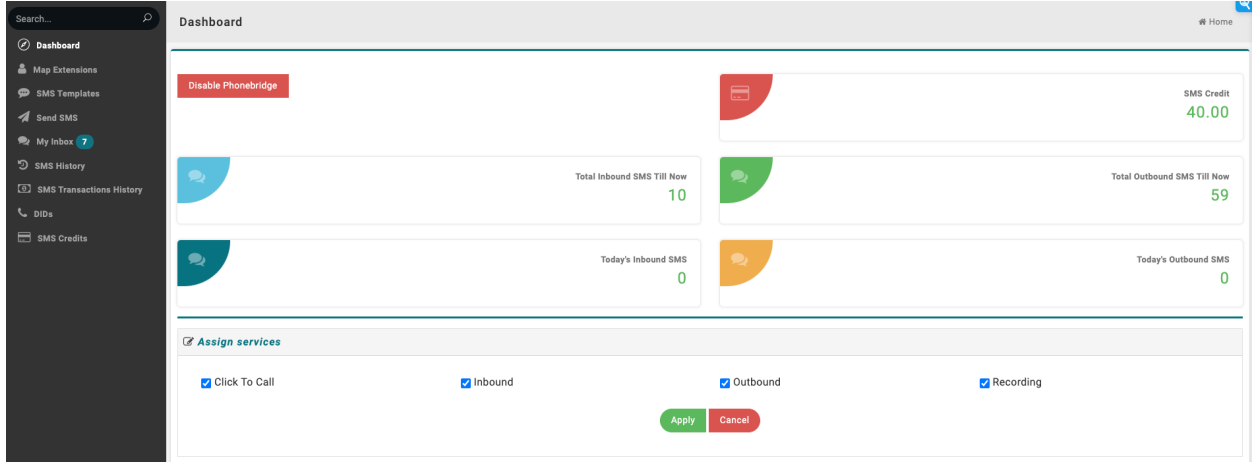
To login to your account, go to crm-centos.comresusa.com and login with your Zoho username and password.



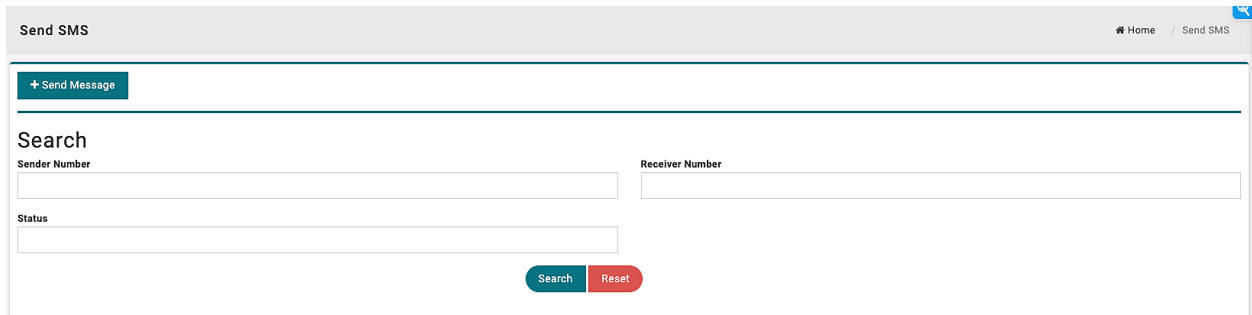
If you do not have an account yet, click [HERE](#) to book your demo and signup for a new account.

Send SMS

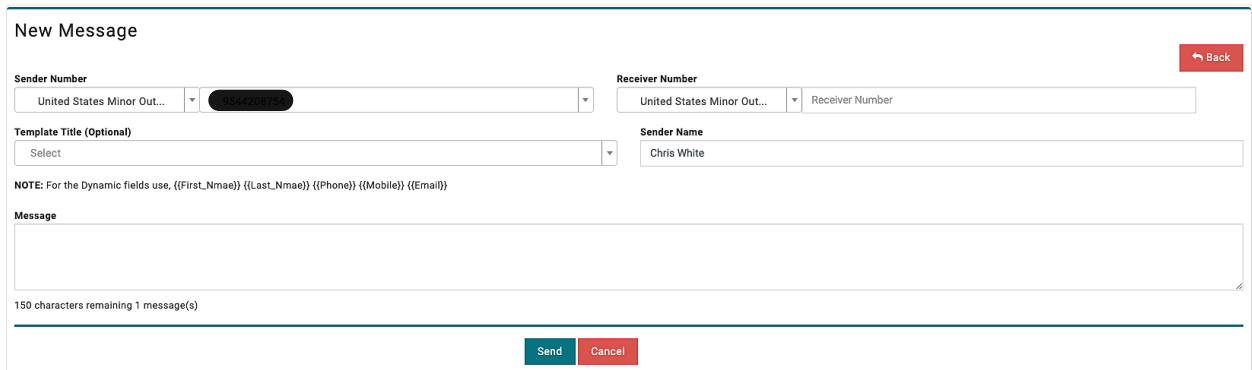
1. On the dashboard, you will see Send SMS. Click Send SMS and select Send Message.



2. Use the Sender Number to select your phone number.



3. Enter under Receiver Number the number you wish to text.
4. Under Message, enter the desired text message and hit Send.



SMS Templates

1. Use SMS Templates to create as many templates as you like.
2. Click Add New and enter a title, keep the status active to use and enter your desired message under Description and click on create.
3. You can edit templates later by clicking the pencil and mark old templates as inactive or change the title and description.

The screenshot shows the 'SMS Templates' management page. At the top, there is a search bar with 'Title' and 'Status' filters. Below the search bar, there is a table of existing templates. The table has columns for Title, Description, Added By, Status, and Actions. Two templates are listed: 'Template 2' and 'Contacts - Intro'. Both are in 'Active' status and were added by 'Chris White'. The Actions column for each template contains edit and delete icons.

Title	Description	Added By	Status	Actions
Template 2	Hi {{First_Name}}, I hope you are doing well today. I am reaching out about {{Product_Name}}	Chris White	Active	
Contacts - Intro	Hi {{First_Name}}, How are you today?	Chris White	Active	

The screenshot shows the 'Create Template' form. It has a 'Title' input field, a 'Status' dropdown menu (set to 'Active'), and a large 'Description' text area. A 'Back' button is in the top right corner. At the bottom, there are 'Create' and 'Cancel' buttons. A character count at the bottom left indicates '150 characters remaining 1 message(s)'.

My Inbox

1. Use the My Inbox to manage all inbound and outbound text messages.
2. You can use the SMS from DID or SMS to DID to quickly find inbound or outbound messages.
3. You can use the SMS status to filter by messages that are received or sent.
4. You can delete any messages using the trashcan in the inbox screen.
5. You can use the Quick Search and change the amount of records displayed on the screen.

Search

SMS from DID SMS to DID

SMS Status

Inbox

Quick Search 10 ▾

View Message	SMS Sender Name	SMS From DID	SMS to DID	SMS Text	Read Status	SMS Status	SMS Created Date	Actions
	(not set)	<input type="text"/>	<input type="text"/>	Awesome. Hope he lik...	✓	received	2023-11-02 19:40:54	
	(not set)	<input type="text"/>	<input type="text"/>	What up	✓	received	2023-10-31 22:16:08	

SMS History

1. SMS History will show all DID's and the total inbound and outbound messages sent. You can export the list of DID's and search for any number in your system.

SMS History

Home / SMS History

Search

Start End Date Date Range Sender Number

Status

SMS History

Quick Search 10 ▾

DID Number	Total SMS	SMS Status	Inbound	Outbound
<input type="text"/>	1	delivered	0	1
<input type="text"/>	68	pending	10	58

SMS Transactions History

1. SMS Transactions History will show all previous transactions of SMS credits.

SMS Transactions History Home / SMS Transactions History

Search

Date Range Type

From DID To DID

[Search](#) [Reset](#)

SMS Transactions History Quick Search 10 [Export](#)

From DID	To DID	Count	Debit Amount	Current Amount	Type	Date
		1	1	41	Inbound	2023-11-03 14:23:46

SMS Credits

1. SMS Credits will show the current SMS credit balance.

SMS Credits: Chris White(Credit Balance: 40) Home / SMS Credits / Chris White

Search

Date Range

[Search](#) [Reset](#)

SMS Credits: Chris White(Credit Balance: 40)

No results found. [Export](#) [Back](#)