



# CloudTalk

## User Manual

### Quick Guide to use your CloudTalk SMSAccount

#### Log In

To login to your account, go to [crm-centos.comresusa.com](http://crm-centos.comresusa.com) and login with your Zoho username and password.

CloudTalk

Sign into your account

Please fill out the following fields to login:

Enter Email ID

Enter Password

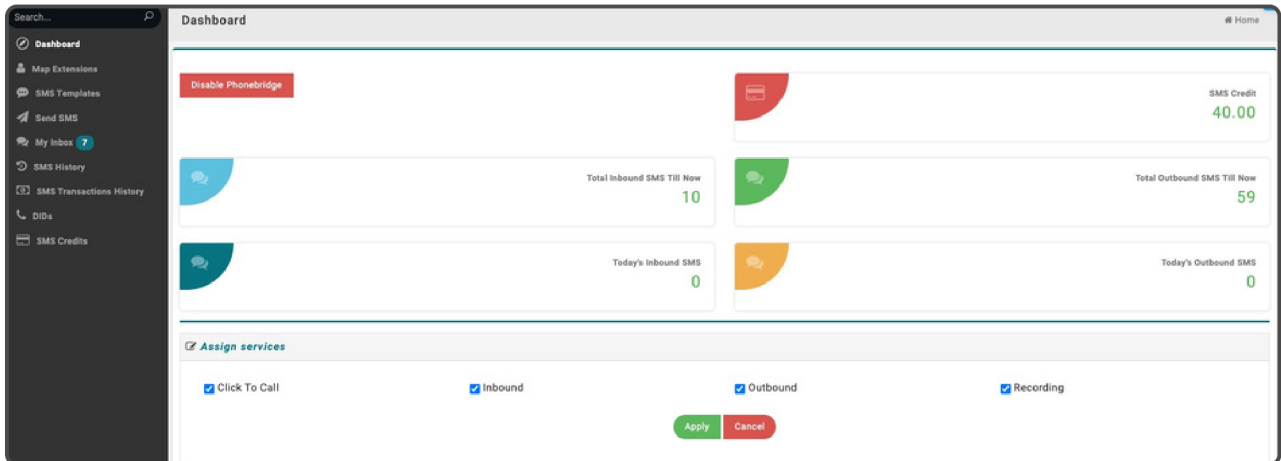
Forgot password?

Login

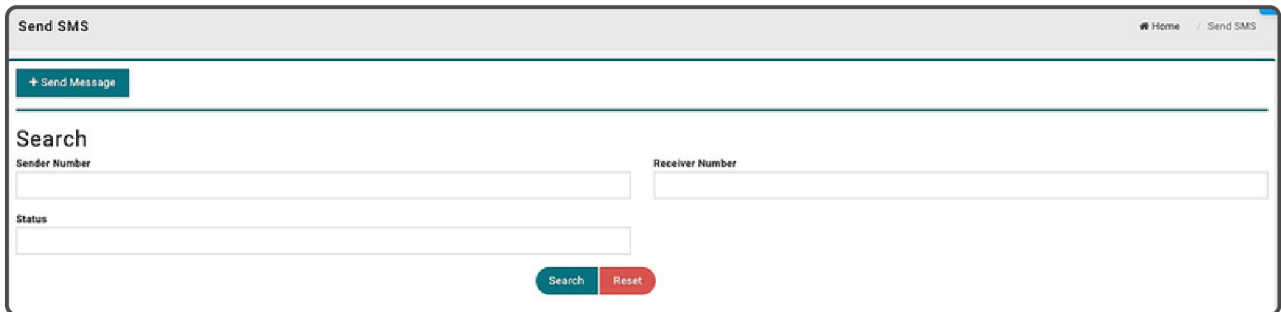
If you do not have an account yet, click [HERE](#) to book your demo and sign up for a new account.

# Send SMS

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

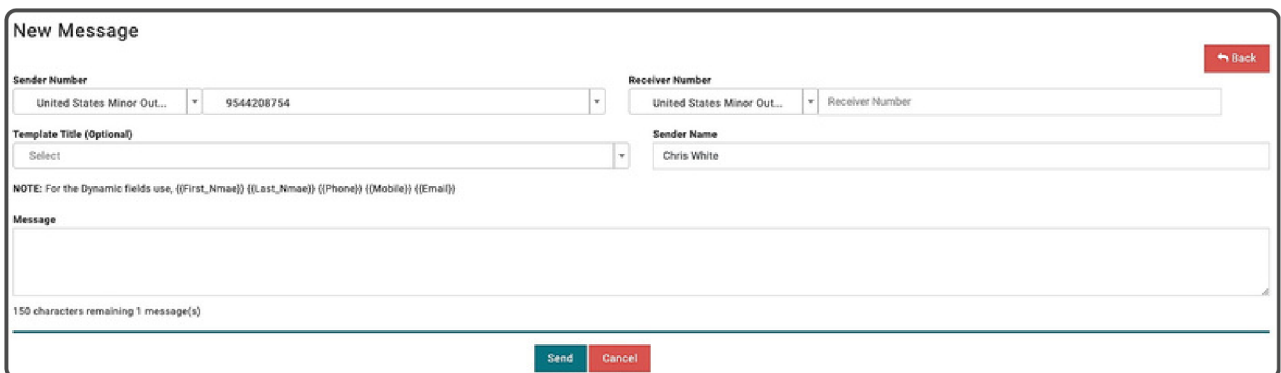


2. Use the Sender Number to select your phone number.



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 fields for 'Title' and 'Status' (set to 'All'), and 'Search' and 'Reset' buttons. Below the search bar, the page title 'SMS Templates' is followed by a 'Quick Search' field, a dropdown menu set to '10', and an '+ Add New' button. The main content is a table with the following data:

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	[Pencil] [Trash]
Contacts - Intro	Hi {{First_Name}}, How are you today?	Chris White	Active	[Pencil] [Trash]

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

# 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.

The screenshot shows the 'My Inbox' interface. It features a search bar with fields for 'SMS from DID', 'SMS to DID', and 'SMS Status', along with 'Search' and 'Reset' buttons. Below the search bar, the page title 'Inbox' is followed by a 'Quick Search' field, a dropdown menu set to '10', and a trashcan icon. The main content is a table with the following data:

View Message	SMS Sender Name	SMS From DID	SMS to DID	SMS Text	Read Status	SMS Status	SMS Created Date	Actions
[Message Icon]	(not set)	7542341525	9544208754	Awesome. Hope he lik...	✓	received	2023-11-02 19:40:54	[Trash]
[Message Icon]	(not set)	7542341525	9544208754	What up	✓	received	2023-10-31 22:16:08	[Trash]

## 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.

DID Number	Total SMS	SMS Status	Inbound	Outbound
9544208755	1	delivered	0	1
9544208754	68	pending	10	58

## SMS Transactions History

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

From DID	To DID	Count	Debit Amount	Current Amount	Type	Date
9544208754	7542341525	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)

SMS Credits: Chris White(Credit Balance: 40)

No results found.