



Opt It Getting Started Guide

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Welcome to Opt It Mobile

Thanks for choosing Opt It Mobile for your text messaging needs. Opt It, Inc. is the leading provider of text messaging applications for businesses. The essential foundation for word of mouth and viral marketing campaigns, Opt It's software platform enables any industry to connect with mobile and web users nationally.

For businesses looking to launch a mobile marketing campaign, text messaging is the most effective and immediate way to reach your audience, hands down. In this Getting Started Guide, you'll learn how to start using Opt It Mobile to promote events, distribute coupons or special offers and distribute other time-sensitive information to your customers in real time.

Welcome to Opt It.

Where to Find Help

Help is available throughout the Opt It software, and can be accessed by clicking on the Help menu item at the top of the page. In addition, please reference the FAQ's at www.optit.com/opt-it-mobile-questions for answers to the most common questions. For questions outside those handled in the software, please contact us via email at support@optit.com.

Key Concepts:

Take a look at a few terms we think will help along the way.

Short code: A short code is a 5 or 6 digit number used to send and receive SMS and MMS messages on cellular networks. Companies that use short codes are approved by the carriers to send text messages into their networks. When you sign up for Opt It Mobile, all of your messages will be delivered using short codes, ensuring that your message is received by the cellular carriers and delivered to the intended recipient.

Keyword: A keyword is a word that is entered into the body of a text message and sent to a short code. Your customers will text your keyword to participate in your mobile programs. Opt It clients get to choose their own keyword(s) as long as it is available, at least 4 characters long and does not begin with a number. Examples:

Text **COMPANY** (**COMPANY is the keyword**) to **46786** (**46786 is the short code**) to join your company's mobile VIP group.

Text **SAMPLE** (**SAMPLE is the keyword**) to **46786** (**46786 is the short code**) to receive today's special offer of the day.





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Mobile Community: A mobile community is a group of members that have opted-in to receive periodic text messages from you. Your keyword must be setup as a subscription to allow people to opt-in and join your mobile community.

Sub-keyword: A sub-keyword is a second word following your keyword separated from the keyword by a <SPACE>. Sub-keywords enable you to extend the functionality of your keyword by giving you the ability to have your keyword act in many different ways and support multiple keyword types. You can create an unlimited amount of sub-keywords. For example:

Text **COMPANY LUNCH (LUNCH is the sub-keyword) to 46786** to join our mobile community and only receive the lunch specials.

Interest: An interest enables you to segment your mobile community and provides the ability to send messages to those smaller groups inside your mobile community. This is equivalent to a sub-group. This is useful for segmenting your list by gender, location, opt-in date, sub-keyword sent in or even for delivering messages to your employees.

Member: A member is your customer, client or member of your audience that has opted-in or joined your mobile community to receive your text messages. Members can opt-out at anytime by replying STOP to any message.

Message: A message is a text message that is sent from Opt It Mobile to one of your members or from one of your members to your short code and received by the Opt It Mobile software to be processed. Messages can be 160 characters in length.

User: A user is you or your employee set up within the Opt It platform.

Logging In

To login, enter the username and password that you created at registration into the matching fields at www.optit.com. Once logged in, you'll immediately be directed to the Opt It dashboard. This is the central location for all your text message marketing needs. The dashboard provides you with an overview of your keywords and messages, as well as quick links to member information and other Opt It functionality, like assigning interests and your Inbox.

The screenshot shows the Opt It dashboard interface. At the top, there is a navigation bar with links for Mobile, Members, Reports, Inbox, Account, and Help, along with a 'Send Text Message' button and a 'Logout' link. Below the navigation bar, there is a search bar for phone numbers, names, or keywords. The main content area is divided into several sections: 'Top Active Keywords' with a table of keyword statistics, 'Messages' with a table of recent messages, and 'Quick Links' with buttons for various actions like 'Assign Interest', 'View Messages', 'Add Member', 'View Inbox', 'View Account', and 'Contact Support'. There are also 'Announcements' on the right side.

Keyword	Total Members	New Last 7 Days	Unsub Last 7 Days	Mobile
TIPS	116	0	0	80
INFO	98	0	0	79
CLUB	71	0	0	62
TEST	38	0	0	26
EVENTS	33	0	0	21

Date	Keyword	Status	# Recipients	Title
01/21/10 02:58 AM	INFO	Sent	1	test4
01/21/10 02:57 AM	B	Sent	1	test3
01/21/10 02:57 AM	A	Sent	1	test2
01/15/10 03:33 AM	A	Sent	1	one recipient A message text
01/14/10 12:21 AM	A	Sent	1	test1



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Customizing Your Keyword

When you're ready to send your first message, begin by customizing your keyword. Do this by selecting **Mobile -> Manage Keywords** from the top menu bar. Select **Edit Keyword** in the actions column for the keyword you'd like to edit. For a subscription campaign, you may edit the Welcome Message, Web Form Verification Message and Already Subscribed Message. Preview your changes by using the Preview Message icon.

You may also change your password and/or time zone any time by selecting the Account icon and the Manage Account menu item.

Types of Keywords and When to Use Them

Note: All keyword types can be edited under **Mobile->Manage Keywords** and clicking Edit Keyword in the actions column for that particular keyword.

Subscription: A keyword that is setup as a Subscription allows you to build a list of members to whom you can periodically send text messages. These members have opted in by texting in your keyword or by registering through a web based sign-up form, giving you permission to send them text messages. Customize the Subscription Welcome Message and add additional response or forward messages by editing your keyword.

Response: A keyword that is setup as a Response is used for information on demand messages; a message where the user gets one response message such as a coupon or password, but does not opt-in to receive further alerts from you. These are one-time messages. Customize a response message by editing the keyword.

Forward: A keyword that is setup as a Forward enables you to forward inbound messages to an email address, mobile phone, URL or inbox. Select edit keyword to set one up as type Forward.

Contest: A keyword that is setup as a Contest is used to create and manage your own contests. Modify contest settings by editing the keyword.

Note: More information regarding how each keyword acts and the meaning of each field is located within the Opt It software in the Help section.



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Sending Messages

Follow these steps for sending messages. If desired, modify your recipient list to include appropriate members.

1. Click on the send text message link at the top of the page or go to **Mobile -> Send Text Message**.
2. Select one or more keywords to send the message.
3. You can send to all members or modify the recipient list. If the list is modified, users can segment the members list in multiple ways including selecting an interest. (See the Help section on the Send Text Message page for specific information.)
4. Select the delivery option to send your message now or on a future date.
5. Enter a title (for internal purposes only).
6. Enter the message, paying special attention to the character counter underneath the field.
7. Preview message and send it out.

How Members Opt-Out

Members can opt-out at anytime by texting the word STOP and your keyword. For example, a member would text STOP KEYWORD or the word STOP to opt-out of your mobile community.

Promoting Your Campaign

Here are some tips to help you get the most from your Opt It Mobile account:

1. **Sign Up Form Widget:** Integrate the Sign Up Form Widget into your website so people can join your mobile community directly from your website. By using the Sign Up Form Widget you will also be able to gather additional demographic information on your members.
2. **Create Signage:** Create signage and flyers similar the ones below to let people know about your mobile promotions and how to get involved. If people do not know about your program they will not be able to sign up.
3. **Email:** Send an email blast about your text message marketing plan describing what capabilities you now have (coupons, contests, special offers, etc.)
4. **Train your staff:** Make sure that your "feet on the street" know all about your text message campaign and are promoting it with your customers every day.



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Web Sign-up Widget

Give your customers a space to opt-in right on your website. Opt It offers its Mobile Sign-Up Form Widget for users to customize and add to their web page, blog or other website. Create your customized Mobile Sign Up Form Widget while logged into your account by selecting **Mobile->Sign Up Form Widget** .

Navigating Your Data

There are a lot of ways to find what you're looking for within the Opt It software. One of the most important features is the Filters, which are available on every page in the system. Filter your data for optimal display by date, keyword, interests, age, gender or location. Filters can also be used to search for a particular user by identifying information. Other navigation features within the site:

Hover

At certain points inside Opt It, holding your cursor over an item will pop up a small window of options. One such place is on the Export link above many lists inside the software, where users are given the option to export to specific file types.

Message Expansion

To allow for better viewing and more information to be seen, hovering over a line item in an Opt It list will cause the line item to expand.

Ordering and Paging

Below lists inside Opt It, you see the following options for manipulating items within the list. Use the Order Results By dropdown menu to select whether you'd like to order your results by keyword, status, keyword type, shortcode, or mobile subscribers. Use the associated radio buttons to indicate ascending or descending order. Use the First, Back, Next and Last buttons to page through the data.

Running Contests

Contests are a great method of expanding your mobile community. Consider holding a contest inside your venue on a busy night; it's the perfect opportunity for customers to interact with your mobile program and to opt in to a subscription group. The gaming element involved with contests really grabs people's interest and the instant gratification of being part of a competition keeps them wanting more.



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Other Opt It Features

User Accounts: Manage your employees with user accounts, by selecting Manage Users under the Account icon. Use this feature to add, edit and delete users. User accounts can be managed according to predefined roles.

Inbox: The inbox is used in conjunction with the keyword type forward. Messages can be forwarded to the inbox so that they can be replied to as well as tracked, stored and exported.

Reports: The reports icon gives you access to all your reporting data. There are multiple types of reports that can be run to give you visibility to the activity of your account.

How to Remove or Unsubscribe Members

You can opt-out members from inside your account in one of four ways:

1. Enter a user's phone number into the Unsubscribe Number section on the dashboard and click Unsubscribe
2. Select the Members icon, find the user and select Edit Member. Inside the Edit member popup, deselect any or all of the keywords associated to the user.
3. Select the Members icon, find the user and select Keywords. Unassign the user from all keywords.
4. Select the Members icon, find the user and select Delete. The system will confirm your desire to delete the selected user.

Helpful Tips for your Text Message Marketing Campaign

Some valuable information we've picked up along the way:

1. Limit the number of messages sent per month: We've found that a good industry standard is no more than 4 to 6 messages per month.
2. Make the timing of your message relevant. Give customers ample time to take advantage of your specials or events, but don't send them so early they'll be forgotten. Don't send messages in the middle of the night.
3. Use a call to action: Spark their interests with an inspiring offer that prompts a response.
4. Send an unsubscribe message. Consider giving your members the opportunity to opt-out periodically. This keeps your member list current with folks who want to receive information about your business.

Importing Existing lists of Opted-In Mobile Phone Numbers

If you have an existing list of members with a previous vendor, that list can be imported into Opt It Mobile. All members will be sent an Opt-In Verification Message to ensure that they did indeed opt-in. Please send your list of numbers to support@optit.com with information on which keyword to load numbers.



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Billing and Pricing Overview

Currently, Opt It offers two pricing models:

Unlimited:

Opt It's *Unlimited* plan allows you to send as many messages as you like for a flat monthly fee. There is no setup fee and your account can include multiple keywords. Pricing is based upon the number of members associated to each one of your keywords. For example:

In your account you have three keywords and they each have 300 members. Your monthly pricing would be \$225.00 (3 * \$75.00) for unlimited messages.

Per message:

Opt It's Per Message plan starts at \$20 per month and includes one keyword (required). All messages are charged at .02 per message except for subscribe and unsubscribe messages which are free on shared short codes.

All billing is done on the 1st of the month.

For detailed pricing information, please see our website: <http://optit.com/opt-it-mobile-pricing>

Support

When you have questions or problems regarding your account, there are two options for support:

Email: support@optit.com

Your account: While logged into your account you can view more detailed information in the Help section. Whenever you have questions regarding our software, your account, or have additional features to suggest, please contact us via phone, email or online.



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Legal

As of October, 16, 2013, the Federal Communications Commission (FCC) requires that telemarketers obtain "prior express written consent" from consumers before sending prerecorded telemarketing calls and text messages using an automated dialing system. Additionally, the "*established business relationship*" exemption has been eliminated. The new requirements appear in the FCC's updated rules and regulations implementing the Telephone Consumer Protection Act of 1991.

Prior express written consent is defined by the FCC as "*an agreement, in writing, bearing the signature of the person called that clearly authorizes the seller to deliver or cause to be delivered to the person called advertisements or telemarketing messages using an automatic telephone dialing system or an artificial or prerecorded voice, and the telephone number to which the signatory authorizes such advertisements or telemarketing messages to be delivered.*"

Prior express written consent must display clearly a disclosure stating the following:

1. By signing the agreement, the individual is authorizing the seller to deliver telemarketing calls using an automatic telephone dialing system or an artificial or prerecorded voice; and
2. The individual is not required to sign the agreement as a requirement for purchasing property, goods, or services.

The individual's signature may be any legally recognized electronic or digital form. Selected exemptions from obtaining written consent are attainable for some call and message types, including emergency, political, and informational calls or messages.

For more information, please visit the FCC Website (<http://www.fcc.gov/>). Please consult your attorney for further legal advice.

You remain fully responsible for all legal compliance for all messages you send, and you should consult your attorney with any questions regarding legal compliance.