



User Guide



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Step-by-step guide

This is a guide and not a manual, simply because we don't all approach a problem the same way. This document is meant to guide you through the process of setting up an engagement, but it also allows you to navigate and use the system in a way that makes sense to you.

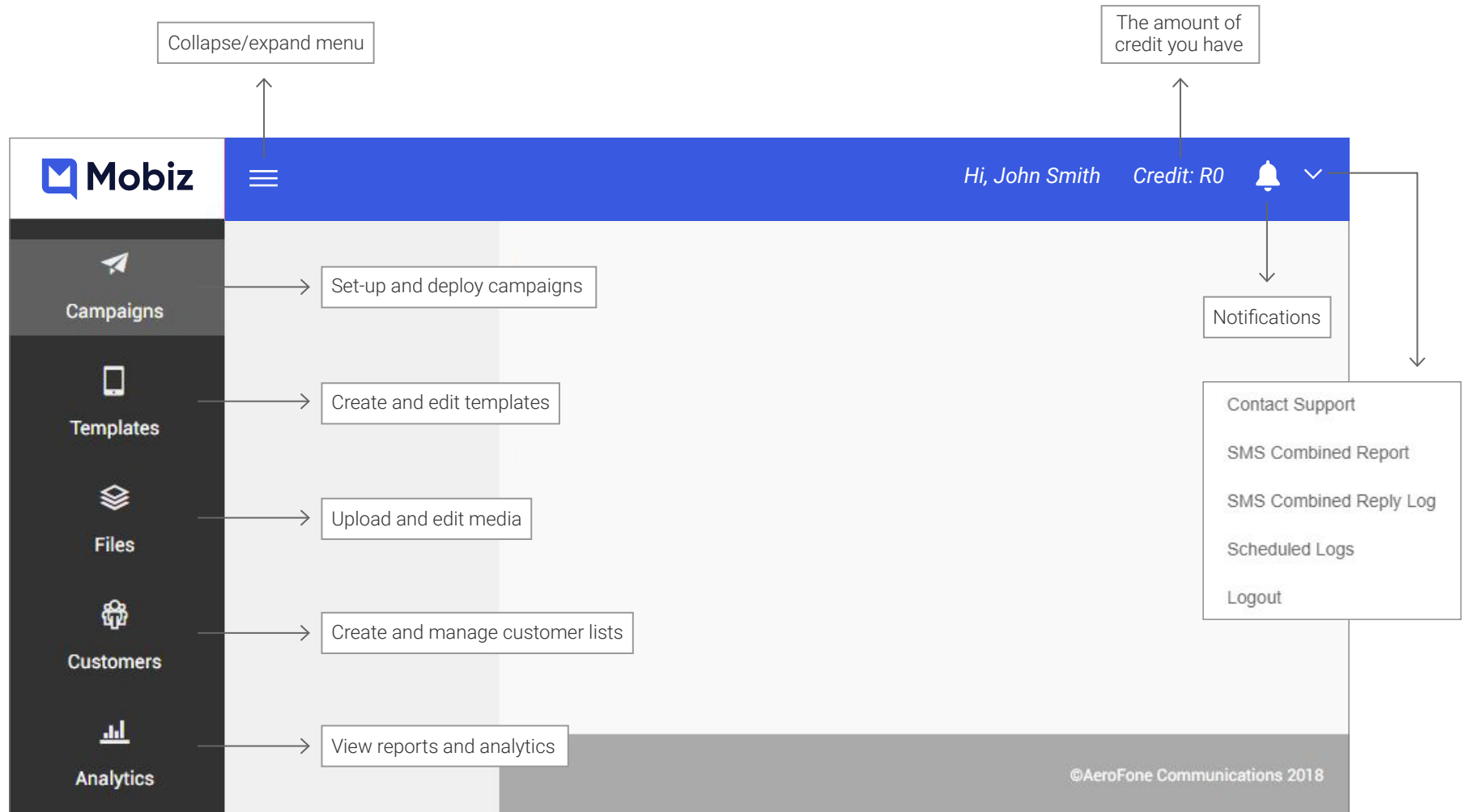
There are many different way to create your engagement. You can follow the step by step guide or start with step 2 then move to step 3 or start with step 3. Ultimately it will all lead to the same outcome which is step 4.

The reason for this guide is to give new users a complete overview of how the engagement is put together. For our existing customers, we have made the guide modular in order for you to skip the steps you know and jump straight to the section you need help with, but also there might be features which you are not aware of and can easily implement in your current campaigns.



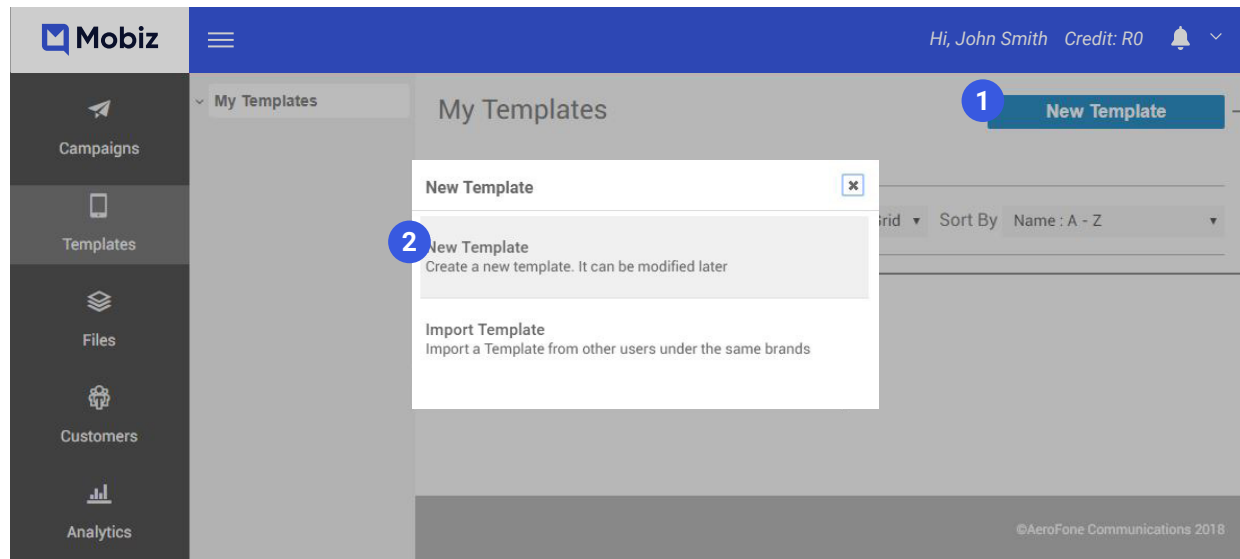
Interface

Get to know the Mobiz interface.



Create template

Follow the steps below to create a new template. Once you have created your new template, click 'Edit this template' to start adding content.



The screenshot shows the Mobiz interface with a sidebar on the left containing 'Campaigns', 'Templates', 'Files', 'Customers', and 'Analytics'. The main area is titled 'My Templates' and features a 'New Template' button. A modal dialog is open, showing options to 'New Template' (Create a new template. It can be modified later) and 'Import Template' (Import a Template from other users under the same brands). Three numbered steps are highlighted: 1. Click on 'New Template' button. 2. Select 'New Template' option in the modal. 3. Enter 'New Template' in the 'New template name' field and click 'Save'.

1 Click on New Template

2 Select New Template

3 New template name

Give your new template a name and click Save.

Save

Template options

Hover over the template to display the different options.



Edit this template



Send this template to another user



Make a copy of this template



Move this template to a folder



Rename this template



Delete this template



Template dashboard

In the template interface you can start adding content to your template using the different available features.

The screenshot shows the Mobiz Template dashboard interface. On the left is a dark sidebar with navigation options: Campaigns, Templates, Files, Customers, and Analytics. The main content area is titled "New Template > Home" and includes a blue "Add Page" button. Below the title are tabs for "Manage", "Styles", "Plugin", and "Test Data". A "Go to page" dropdown menu is set to "Home". A central dashed box contains a "+ Add Content" button. To the right, a "New Page Name" dialog box is open, showing a text input field with "New Page" and a "Save" button. A "Go to page" dropdown menu is also visible, showing options for "Home", "Home", and "New Page".

Annotations with arrows point to the following elements:

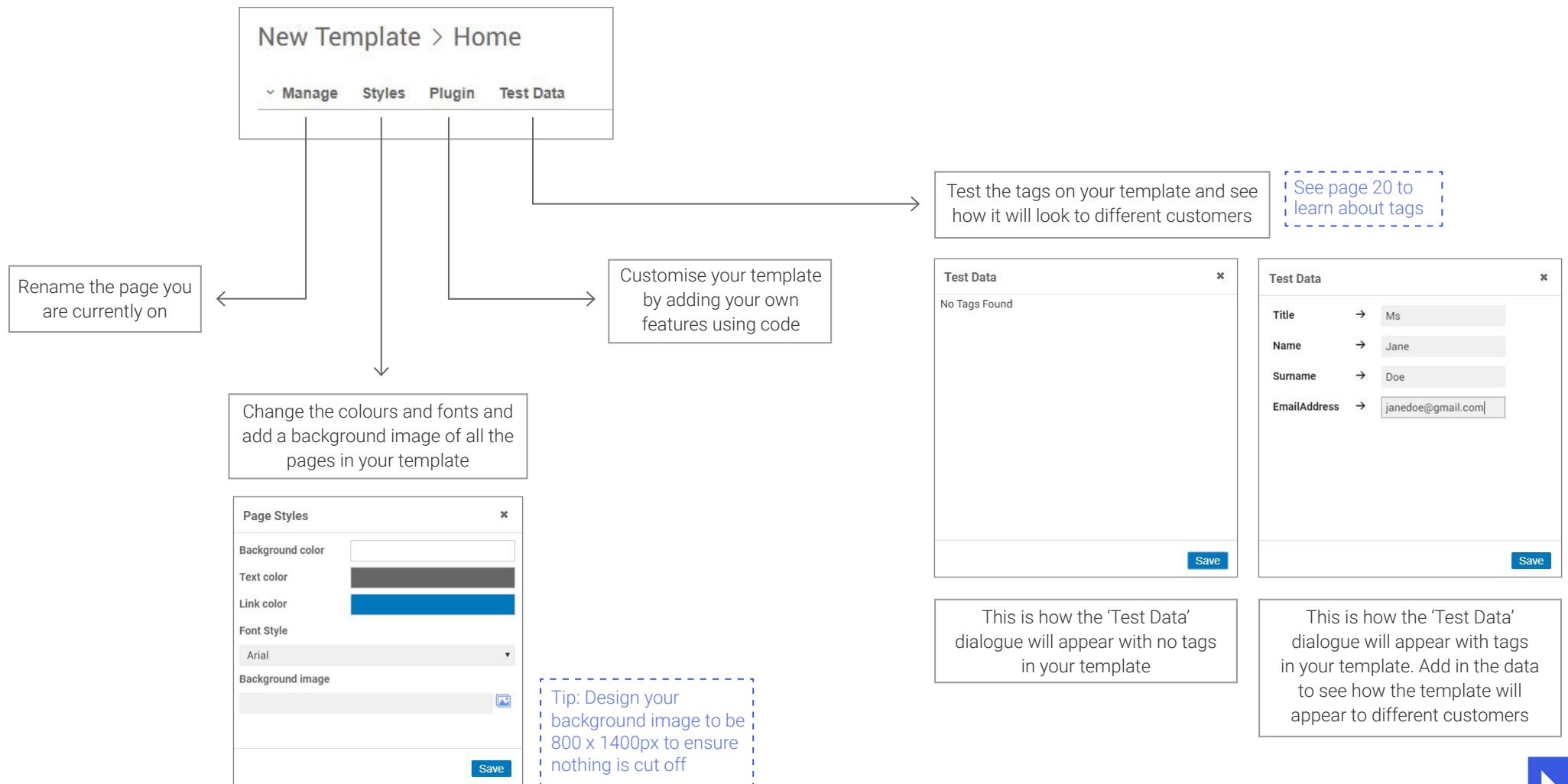
- Page name**: Points to the "New Page Name" dialog box.
- Template name**: Points to the "New Template > Home" header.
- Add another page and give it a name**: Points to the "Add Page" button.
- Add content to your template**: Points to the "+ Add Content" button.
- View pages you created**: Points to the "Go to page" dropdown menu.
- This is the preview screen**: Points to the mobile device preview on the left.

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Template dashboard

Customise the look of your template and test your data using the template options.



Add content



Image: Add a static image located on your computer or in 'Files'.



External Images: Add a static image from an online external source .



Image Map: Add a static image with different clickable sections.



Image Slider: Create rotating slides using multiple images.

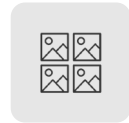


Image Icons: Add multiple images within one row.



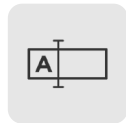
Plain Text: Add text and use the editing tools to change the text appearance.



Text Link: Add hyperlinks to text and use the editing tools to change the text appearance.



Quick Table: Create a table with columns and rows.



Text Answer: Add a question that requires a short text answer.



Comment Box: Add a box where users can input a long text answer.



Single Answer: Add a question that requires users to select one answer from multiple options.



Multiple Answer: Add a question that requires users to select more than one answer from multiple options.



Rating: Select from a variety of symbols, as well as the number of symbols you'd like to display.



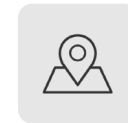
Submit Button: Add this button to allow user to submit a form or survey they have filled in.



Countdown Timer: Select a future date and time for the time to countdown and use the editing tools to change the timer appearance.



Number Animator: Choose a number for the animator to count up to, as well as the caption and number appearance.



Map: Type the address / area for the map to display.



YouTube: Add a YouTube video that plays in your template.



Vimeo: Add a Vimeo video that plays in your template.



DailyMotion: Add a DailyMotion video that plays in your template.



SoundCloud: Add SoundCloud audio that plays in your template.



Barcode: Add a barcode to your template and choose your own code and symbology.



QR Code: Add a QR Code to your template and choose the code content.



Add content

Visuals

Visuals can be added from files stored on Mobiz or external sources. See page for linking an image to a destination.

The diagram illustrates the process of adding content to a page. It is divided into two main sections: adding a local image and adding an external image.

Local Image Addition:

- Image Selection:** A 'Select Image' dialog shows a file explorer with folders for 'Marketing' and 'Statements'. A callout suggests: "Create sub-folders for different brands/campaigns".
- Image Configuration:** An 'Image' dialog shows a large dashed box for the image. Callouts explain: "Choose image from file on your computer or files saved on Mobiz" (pointing to the selection step), "Select an action/location for the image to link to" (pointing to the 'Destination' dropdown), "Select text that describes the image for users who can't see it" (pointing to the 'Alt text' input), and "Choose whether to have the image fill the width of the screen or leave a gap" (pointing to the 'No margin' checkbox).

External Image Addition:

- External Image Configuration:** An 'External Image' dialog has an 'Image URL' input field. A callout says: "Select the URL location of the image". It also has a 'Destination' dropdown and a 'No margin' checkbox.

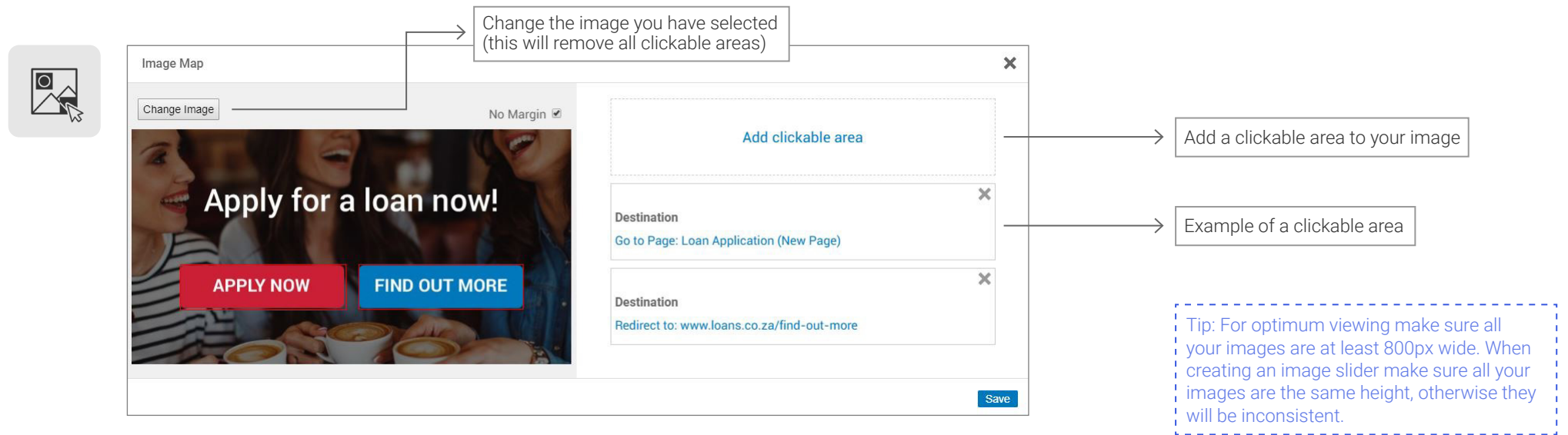
Tip: For optimum viewing make sure all your images are at least 800px wide.



Add content

Visuals

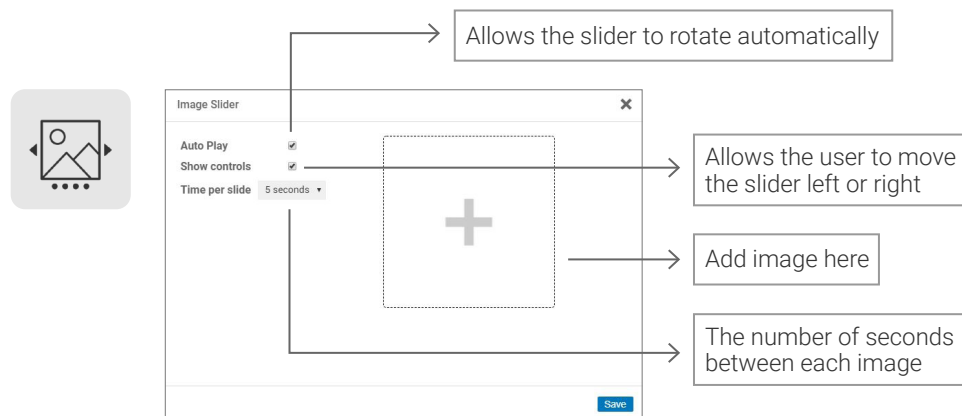
Visuals can be added from files stored on Mobiz or external sources. See page for linking an image to a destination.



The **Image Map** editor interface includes a main preview area and a configuration panel on the right. The preview area shows a banner image with the text "Apply for a loan now!" and two buttons: "APPLY NOW" (red) and "FIND OUT MORE" (blue). The configuration panel has a "Change Image" button, a "No Margin" checkbox, and two "Destination" sections. The first destination is "Go to Page: Loan Application (New Page)" and the second is "Redirect to: www.loans.co.za/find-out-more". A "Save" button is at the bottom right.

Annotations for the Image Map editor:

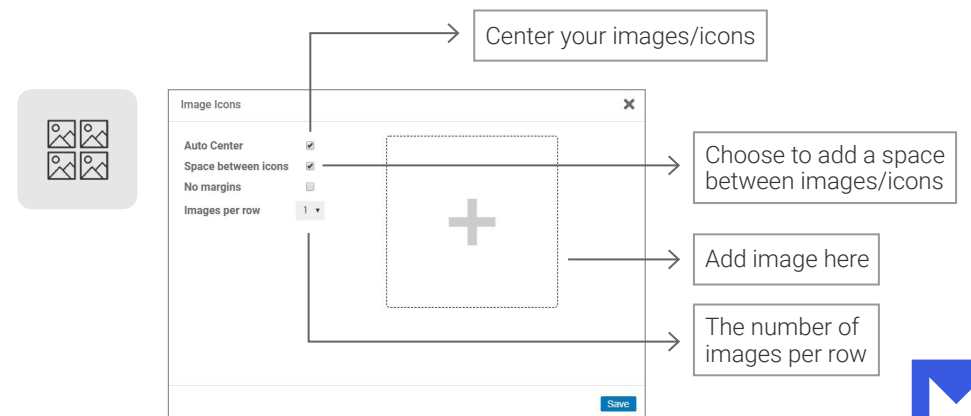
- Change the image you have selected (this will remove all clickable areas)
- Add a clickable area to your image
- Example of a clickable area
- Tip: For optimum viewing make sure all your images are at least 800px wide. When creating an image slider make sure all your images are the same height, otherwise they will be inconsistent.



The **Image Slider** editor interface includes a configuration panel on the left and a central preview area with a large plus sign. The configuration panel has "Auto Play" (checked), "Show controls" (checked), and "Time per slide" set to "5 seconds". The preview area has a dashed box with a plus sign in the center.

Annotations for the Image Slider editor:

- Allows the slider to rotate automatically
- Allows the user to move the slider left or right
- Add image here
- The number of seconds between each image



The **Image Icons** editor interface includes a configuration panel on the left and a central preview area with a large plus sign. The configuration panel has "Auto Center" (checked), "Space between icons" (checked), "No margins" (unchecked), and "Images per row" set to "1". The preview area has a dashed box with a plus sign in the center.

Annotations for the Image Icons editor:

- Center your images/icons
- Choose to add a space between images/icons
- Add image here
- The number of images per row



Add content

Texts

Add text to your template in the form of plain text, text links or a quick table.



The 'Plain Text' editor window shows a toolbar with options for font (Sans Serif), style (Normal), and formatting (Bold, Italic, Underline, Strikethrough, Color, Background Color). Below the toolbar is a text input field containing the text 'This is an example of plain text.' and a 'Save' button at the bottom right.

- Sans Serif** Select the font
- Normal** Select the font size
- B I U** Select bold, italics, underlined or strikethrough
- A** Select the colour and background colour of the text
- 1 2 3** Select numbered text or bulleted text and the alignment

The 'Choose color' dialog box features a color selection area with a gradient and a color picker. It includes input fields for Red (R), Green (G), and Blue (B) values, a hex code field (currently #000000), and an 'OK' button.



The 'Text Link' editor window includes sections for 'Layout' (Left align), 'Separator' (a horizontal line), and 'Link Style' (Edit). A 'Label' field is set to 'Name of the text link' and a 'Destination' field is set to 'None'. A 'New Link' button is visible in a dashed box. A 'Save' button is at the bottom right.

- Name of the text link
- Destination of text link
- Select a separator to divide the text, such as a horizontal line
- Add a new link
- Edit the appearance of your link(s)

The 'Style Editor' dialog box shows settings for 'Font' (Arial), 'Colour' (black), and 'Background' (Transparent). It includes 'Save' and 'Load' buttons at the top right and an 'Apply' button at the bottom right.



Add content

Texts

Add text to your template in the form of plain text, text links or a quick table.

Table

Fixed Layout Add 2 column row Add 1 column row

No margin

Table Style Edit

STATEMENT		
DATE	DESCRIPTION	AMOUNT
	OPENING BALANCE	{{OpeningBal}}
{{Desc1}}		{{Amt1}}
{{Desc2}}		{{Amt2}}
{{Desc3}}		{{Amt3}}
	CLOSING BALANCE	{{ClosingBal}}
	MINIMUM PAYMENT	{{MinPay}}
	DUE BY	{{DueDate}}

See 20 page to learn about tags

Save

Edit cell

Text

STATEMENT

Destination

None

Cell Style

Edit

Add Conditional Cell

See page 21 to learn about conditions

Save

Style Editor

Font Arial Normal B I U S

Colour

Background Transparent

Border Colour

Border Thickness 1 Border top none

Border bottom none Border left none

Border right none

Apply

Select Style

Click on item to apply/append. Search

- Red Text Bottom Border 1
- Bottom Border 1
- Bottom Line 2
- Light Grey BG
- Dark Grey BG

Save Styles so you can load them later to re-use

Select Fixed Layout to ensure each column is the same width

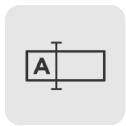
Edit the appearance of the table



Add content

Questions

Create a form or survey by adding questions and a submit button in order to complete the form.



Textbox
✕

<p>Label</p> <input style="width: 90%;" type="text"/>	<p>Label Style</p> <p>Edit</p>
<p>Preset</p> <input style="width: 90%;" type="text"/>	<p>Box Style</p> <p>Edit</p>
<p>Placeholder Text</p> <input style="width: 90%;" type="text"/>	<p>Validation</p>
<p>Format</p> <p>Text ▼</p>	<p>Min Length <input style="width: 50%;" type="text"/></p> <p>Max Length <input style="width: 50%;" type="text"/></p> <p>Regular Expression <input style="width: 90%;" type="text"/></p>
<p>Required field <input type="checkbox"/></p>	

[Save](#)

Label: Add your question here.

Preset: The standard text entry that will remain unless the user changes it.

Placeholder Text: Text that offers a hint about what the user needs to input and disappears once the user types their own answer.

Format: Choose between Text, Numeric, Email, Phone Number and Date. This allows for the data entered to be validated and min/max values established.

Required field: Choose whether the user needs to provide an answer in this field in order to submit the form.

Label Style: Edit the appearance of the text question.

Box Style: Edit the appearance of the answer box.

Validation: Choose to have answer validated with min/max length, values or dates.



Comment Box
✕

<p>Label</p> <input style="width: 95%;" type="text"/>	<p>Style</p>
<p>Preset</p> <input style="width: 95%;" type="text"/>	
<p>Placeholder text</p> <input style="width: 95%;" type="text"/>	
<p>Box Style</p> <p>Edit</p>	

[Save](#)

Edit the appearance of the label

Style Editor
✕

[Save](#) [Load](#)

Font	Arial	Normal		B	<i>I</i>	<u>U</u>	
Colour	<input style="width: 100%;" type="color"/>						
Background	<input type="checkbox"/> <input checked="" type="checkbox"/> Transparent						

[Apply](#)

Edit the appearance of the label

Style Editor
✕

[Save](#) [Load](#)

Font	Arial	Normal		B	<i>I</i>	<u>U</u>	
Colour	<input style="width: 100%;" type="color"/>						
Background	<input style="width: 50%;" type="text"/> <input type="checkbox"/> Transparent						
Border Colour	<input style="width: 100%;" type="color"/>						
Border Thickness	1 ▼	Border Radius	0 ▼				
Border top	solid ▼	Border bottom	solid ▼				
Border left	solid ▼	Border right	solid ▼				

[Apply](#)



Add content

Questions

Create a form or survey by adding questions and a submit button in order to complete the form.



Multiple Choice (One answer) [X]

Type

- Radio Buttons
- Dropdown

Label

Requires Answer

Label Style [Edit](#)

Option Style [Edit](#)

Save

Radio Buttons

Dropdown

How often do you shop?

- Everyday
- Three times a week
- Once a week
- Every two weeks
- Once a month

How often do you shop?

Please Select

Please Select

Everyday

Three times a week

Once a week

Every two weeks

Once a month



Multiple Choice (multiple answers) [X]

Label

Min number of selections

Max number of selections

Label Style [Edit](#)

Option Style [Edit](#)

Save

Example

Which things do you usually purchase?

- Clothing
- Shoes
- Food
- Accessories

Select the minimum and maximum number of selections that a user can make



Add content

Questions

Create a form or survey by adding questions and a submit button in order to complete the form.



Rating ✕

Label

Unfilled Color

Symbol

Filled color

Number of symbols

Label Style
[Edit](#)

Default Value

[Save](#)

Example

How do you rate your experience?



Choose the symbol filled and unfilled colour



Submit Button ✕

Type
 Button Image

Input Set Title

Label

Destination

Width

Complete the input set?

Image

Layout

[Save](#)

Select a name for your form or survey

Select where the user goes once they submit the form

Choose whether the form input is complete or whether you would like users to continue answering questions on the next page

Choose to use a standard button or your own image



Add content

Widgets

Add widgets to bring interest to your template.



Countdown Timer
✕

Date

Hour: Minute:

Timer Style

[Edit](#)

Auto Hide Day

[Save](#)



Select the date and time you would like the timer to countdown to

Edit the appearance of the timer

Choose to hide the day if the timer is only counting down hours



Number Animator
✕

Number

Type

Plain Number

Duration

2 seconds

Caption

Animator Style

[Edit](#)

[Save](#)

80000

Number of customers

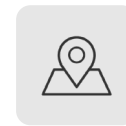
Type in the number you'd like to animate

Choose between a Plain Number, Decimal and Percentage

Choose how long the number animates for

Type in a caption for your number

Edit the appearance of the number



Map
✕

Drag marker to desired location. Use '+' and '-' or mouse scroll to zoom. You can also use search box to quickly find the location.

Search

No margin

[Save](#)

Type an address and click 'Search' to display location on the map. Use the plus and minus symbols to select the view you are happy with.



Add content

Embedded media

Add a video or sound file that plays in your template.

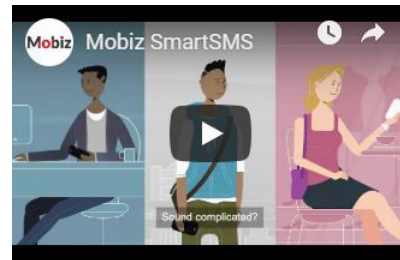
 **YouTube Video** ✕


URL

No margin

Paste the YouTube video URL here

[Save](#)



 **Soundcloud** ✕

Soundcloud URL

No margin

Paste the Soundcloud URL here

[Save](#)

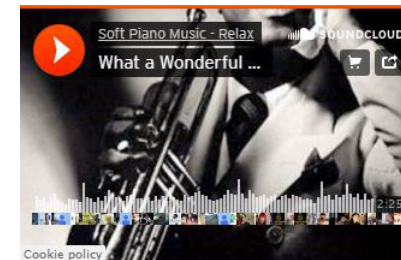
 **Vimeo video** ✕

Vimeo URL

No margin

Paste the Vimeo video URL here

[Save](#)



 **Dailymotion Video** ✕

Dailymotion URL

No margin

Paste the Dailymotion video URL here

[Save](#)



Add content

Codes

Add a video or sound file that plays in your template.



Barcode ✕

Code Text

Symbology

Colour

Background Colour

Show code

Save

Type in your code number here

Select the symbology you would like to use

Select the code colour

Select the background colour

Choose whether to show the code number or not



QR Code ✕

Code Content

Mode URL Data

Colour

Background Colour

Save

Type in your URL or data here

Choose whether to take the user to a website or display text

Select the code colour

Select the background colour

Tip: Make sure your codes are displayed in a darker colour to the background (black on white is the best) otherwise they will be difficult to scan.



Add content

Destinations

Control where the user is directed to when they tap on any of the content types that allow for a destination.

Call: Type in the number you would like users to call.

SMS: Type in the number you would like users to SMS.

WhatsApp: Type in the number you would like users to WhatsApp.

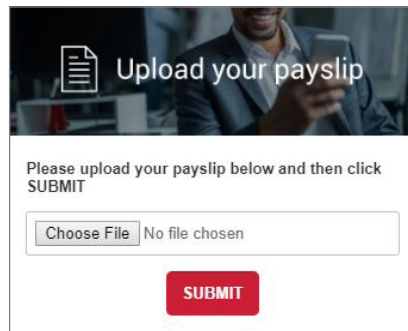
Email: Type in the email address you would like users to email.

Go to Page: Select an existing sub-page or create a new one that users will be taken to.

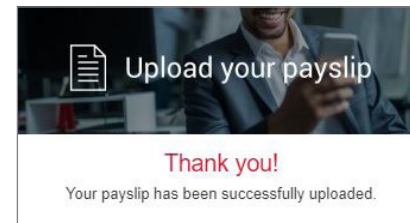
File Upload: Allows users to upload a file/image or take a picture with their camera.

- Type:** Users can either upload a file/image or take a picture with their camera
- Instruction:** Type the instructions that the user must follow, eg: Please upload your payslip, then click Submit
- Button Label:** Type the button text, eg: Submit
- Upload Complete Page:** Choose an existing sub-page or create a new one which will notify the user if their upload was successful
- Image:** Select an image to display at the top of the page
- Get User Location:** Choose to get the user's location from the image

File Upload page example



File Upload complete page example



Note: You need to design your own success (File Upload complete) page.



Add content

Destinations

Control where the user is directed to when they tap on any of the content types that allow for a destination.

Payment: Allows users to make a payment via the chosen payment partner.

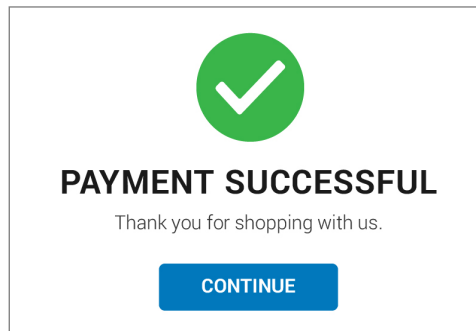
Paypoint Name	Select a name for the paypoint
Amount	Type the amount that the user needs to pay
Customer Reference	The user's reference
Currency	Choose the currency
Success Page	Choose an existing page or create a new page
Fail Page	Choose an existing page or create a new page
Payment Partner	Select the payment partner you would like to use

Tip: Use tags to allow for a different amount for each user. See page 20 to learn about tags.

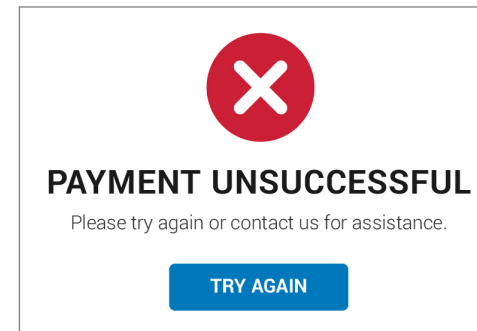
Payment Partner

- ipay
- Please select
- paygate
- ipay
- spg
- payfast

Success page example



Fail page example



Note: You need to design your own Success and Fail pages.




Add content

Destinations

Control where the user is directed to when they tap on any of the content types that allow for a destination.



vCard: Allows users to download an electronic business card.



First Name	<input type="text"/>
Last Name	<input type="text"/>
Phone Number	<input type="text"/>
Organization	<input type="text"/>
Job title	<input type="text"/>
Email	<input type="text"/>
Homepage	<input type="text"/>
Photo	<input type="text"/> 



Example of vCard

Calendar: Create an event that users can save for future reference.

Start time	<input type="text"/> 
End time	<input type="text"/> 
Location	<input type="text"/>
Subject	<input type="text"/>
Description	<input type="text"/>

Subject	Valentine's Sale!		
Location	StyleSmith		
Start time	Thu 2/14/2019 	9:00 AM <input type="text"/>	<input type="checkbox"/> All day event
End time	Thu 2/14/2019 	9:00 PM <input type="text"/>	
Save the date to our Valentine's Sale, happening on the 14th of February from 9am til 9pm! Don't miss out!			

Example of calendar



Add content

Tags

Add tags to personalise the content in your template. The tags in your template need to be the same as the headings in your customer list, this is how the data is inputted into the template. Tags can be added by including double curly brackets on either side of the text, eg. `{{Name}}`. You also need to make sure that the tag uses the exact same text as featured in the customer list heading otherwise it won't show correctly.

Dear `{{Title}}` `{{Name}}` `{{Surname}}`, there is an amount of R `{{MinPay}}` due by `{{DueDate}}` on your StyleSmith account. View your statement below.

STATEMENT	
DATE DESCRIPTION	AMOUNT
OPENING BALANCE	R <code>{{OpeningBal}}</code>
<code>{{Desc1}}</code>	R <code>{{Amt1}}</code>
<code>{{Desc2}}</code>	R <code>{{Amt2}}</code>
<code>{{Desc3}}</code>	R <code>{{Amt3}}</code>
CLOSING BALANCE	R <code>{{ClosingBal}}</code>
MINIMUM PAYMENT	R <code>{{MinPay}}</code>
DUE BY	<code>{{DueDate}}</code>



Dear Mr Vuyo Dhlamini, there is an amount of R 371.21 due by 05/06/2019 on your StyleSmith account. View your statement below.

STATEMENT	
DATE DESCRIPTION	AMOUNT
OPENING BALANCE	R 4560.33
APR 12 PURCHASE	R 800.00
APR 25 PAYMENT - THANK YOU	R 500.00
MAY 11 INTEREST	R 70.36
CLOSING BALANCE	R 4930.69
MINIMUM PAYMENT	R 371.21
DUE BY	05/06/2019

Test your tags using the test data function

Test Data ✕

Title	→	<input type="text" value="Mr"/>
Name	→	<input type="text" value="Vuyo"/>
Surname	→	<input type="text" value="Dhlamini"/>
MinPay	→	<input type="text" value="371.21"/>
DueDate	→	<input type="text" value="05/06/2019"/>
OpeningBal	→	<input type="text" value="4560.33"/>
Desc1	→	<input type="text" value="APR 12 PURCHASE"/>
Amt1	→	<input type="text" value="800.00"/>

[Save](#)

Tags from customer list

As seen by customer

See page 25 to find out more about customer lists

Functions	ID	Title	Name	Surname	Cellphone	Email	OpeningBal	Desc1	Amt1	Desc2	Amt2	Desc3	Amt3	ClosingBal	MinPay	DueDate
	1	Mr	Vuyo	Dhlamini	27825684899	vdhlamini@gmail.com	4560.33	APR 12 PAYMENT	800.00	APR 25 PAYMENT - THANK YOU	500.00	MAY 11 INTEREST	70.36	4930.69	371.21	05/06/2019



Add content

Effects and spacings

The main interface shows an image with the text "Upload your payslip". To the right is a metadata table:

Filename	Marketing/upload-payslip.jpg
Destination	None
Alt Text	Upload Payslip
Margins	No
Conditions	Always Display
Effects	No Effect
Spacings	Add Spacing

Callout boxes point to the edit and delete icons, labeled "Edit the content" and "Delete the content".

Below the main interface are three panels:

- Effects Panel 1:** "Effects" title, "Select Effect Type" dropdown (None), "Fade In" checkbox, "Save" button.
- Effects Panel 2:** "Effects" title, "Select Effect Type" dropdown (None, Slide-In (left), Slide-In (right)), "Save" button.
- Spacer Panel:** "Spacer" title, "Space before" dropdown (0 lines), "Space after" dropdown (0 lines), "Save" button.

Callout boxes explain the actions:

- "Add effects to your content to bring attention to them" (points to the Effects panels).
- "Add spaces before and/or after your content" (points to the Spacer panel).



Add content

Conditions

Conditions are used to control who sees specific content in the template. Conditions use tags, which come from the headings in your customer list. They can be added to all the different types of content.

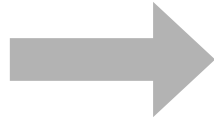
Add Condition ✕

Type

- Text ▾
- Text
- Numeric

Next

Conditions can be text or numeric



Conditions ✕

Save Load Clear

Gender <small>Add new condition</small>	= ▾	Female	✕
City <small>Add new condition</small>	not ▾	Cape Town	✕
Name <small>Add new condition</small>	from ▾	N	✕
Name <small>Add new condition</small>	fromTo ▾	From A To C	✕
Name <small>Add new condition</small>	startWith ▾	A	✕

Save

Example of text conditions

Conditions ✕

Save Load Clear

PayOverdue <small>Add new condition</small>	= ▾	0	✕
PayOverdue <small>Add new condition</small>	not ▾	0	✕
MinimumDue <small>Add new condition</small>	< ▾	5000	✕
MinimumDue <small>Add new condition</small>	> ▾	5000	✕
BalanceClosing <small>Add new condition</small>	<= ▾	0	✕
PayOverdue <small>Add new condition</small>	>= ▾	10000	✕
BalanceClosing <small>Add new condition</small>	fromTo ▾	From 0. To 50	✕

Save

Example of numeric conditions



Add content

Conditions

Conditions are used to control who sees specific content in the template. Conditions use tags, which come from the headings in your customer list. They can be added to all the different types of content.

If you want to target multiple results for the same condition, select the blue 'Add new condition' instead of the 'Add Condition' button, otherwise you will only be targeting users who match all the conditions.

A screenshot of the 'Conditions' panel. It shows a list of conditions for the 'City' field. There are three conditions: 'Cape Town', 'Johannesburg', and 'Port Elizabeth'. Each condition has a dropdown menu set to '=', a trash icon, and a small 'x' icon. A blue 'Add new condition' link is visible below the first condition. A green checkmark is overlaid on the right side of the panel.

This will target users from Cape Town, Johannesburg OR Port Elizabeth

A screenshot of the 'Conditions' panel. It shows three conditions for the 'City' field: 'Cape Town', 'Johannesburg', and 'Port Elizabeth'. Each condition has a dropdown menu set to '=', a trash icon, and a small 'x' icon. A blue 'Add new condition' link is visible below each condition. A red 'X' is overlaid on the right side of the panel, indicating this configuration is incorrect.

This will target users from Cape Town, Johannesburg AND Port Elizabeth

A screenshot of the 'Conditions' panel with annotations. The panel shows three conditions for 'City': 'Cape Town', 'Johannesburg', and 'Port Elizabeth'. At the top right are 'Save', 'Load', and 'Clear' buttons. At the bottom is an 'Add Condition' button. Two callout boxes with arrows point to the trash icons: one for the 'Cape Town' condition labeled 'Delete the entire condition' and one for the 'Port Elizabeth' condition labeled 'Delete the single condition match'.

A screenshot of the 'Select Conditions' panel. It has a search bar and a list of condition templates. The templates include:

- Balance Less 50**: `{{BalanceClosing}} > 50`
- Paid Up**: `{{BalanceClosing}} <= 0`
- Males 20-25**: `{{Gender}} = Male` and `{{BirthDate}} from 1994[1] To 999`
- Female Cape Town**: `{{City}} = Cape Town` and `{{Gender}} = Female`

Save your conditions so you can load them later for re-use

A screenshot of the 'Test Data' panel. It shows a list of fields with test values:

- Title → Ms
- Name → Susan
- Surname → Smith
- Gender → Female
- City → Johannesburg
- BirthDate → 1988
- BalanceOpening → 4000.00
- BalanceClosing → 2500.00

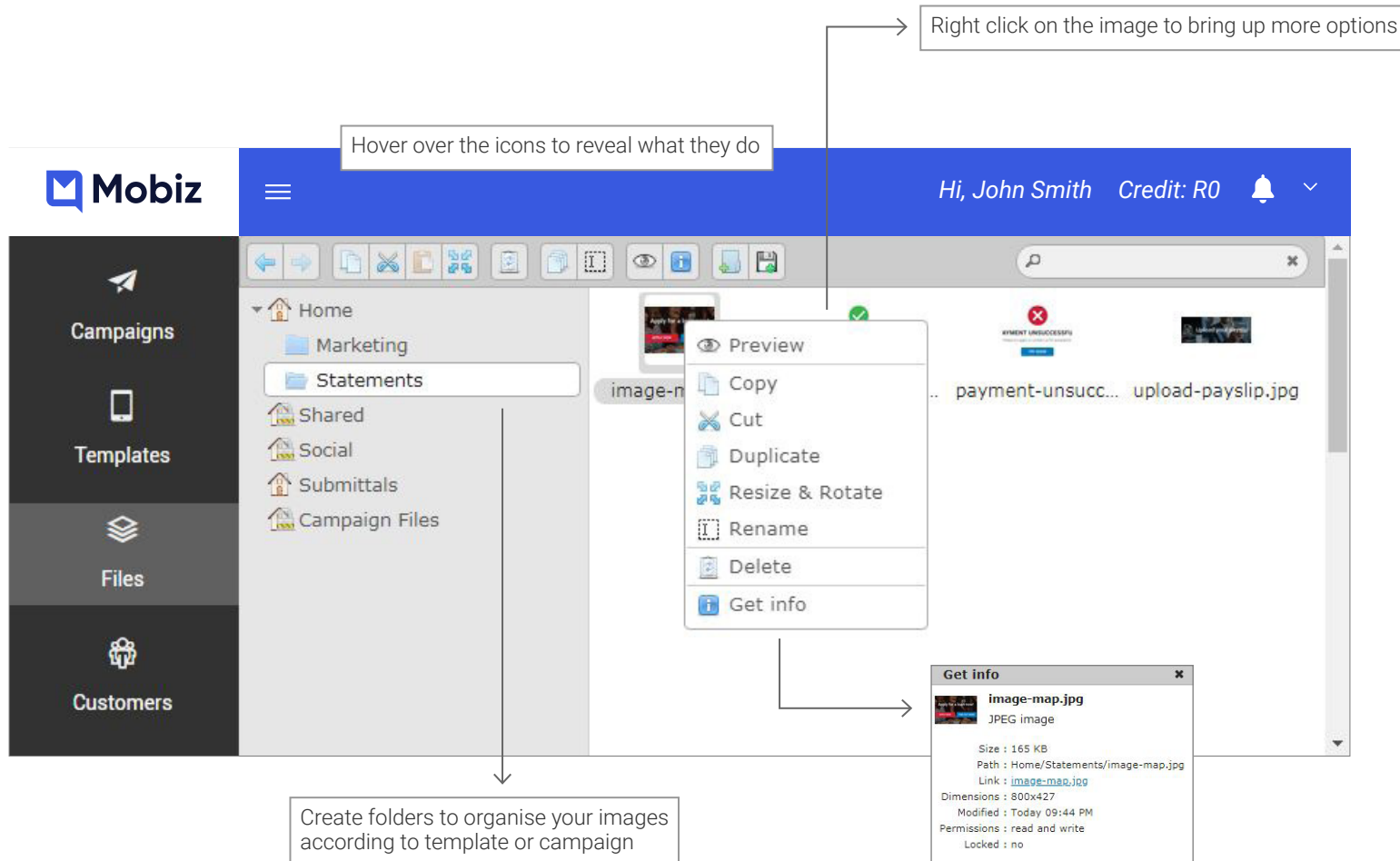
 A 'Save' button is at the bottom right.

Test your conditions using the test data function



Files interface

Use the files interface to upload images to use in templates, edit them and sort them into folders.



Interface

Use the Customers interface to create new customer lists and manage current ones.

The screenshot displays the Mobiz interface for managing customer lists. The top navigation bar shows the user's name 'Hi, John Smith' and credit status 'Credit: R0'. The left sidebar contains navigation icons for Campaigns, Templates, Files, Customers, and Analytics. The main content area is titled 'My Customers > Marketing' and features a 'New Customer List' button. Below this, there is a 'Folder Functions' section and a 'Marketing List' card showing '5 Customers' created on '2019-Feb-13'. A 'Sort By' dropdown menu is open, displaying options: 'Name : A - Z' (selected), 'Name : Z - A', 'Create Time : Oldest First', 'Create time : Newest First', 'Modify Time : Oldest First', and 'Modify time : Newest First'. A context menu is also visible, offering actions: 'Add Folder', 'Move Folder', and 'Rename Folder'. The footer includes the copyright notice '©AeroFone Communications 2019'.



New customer list

There are various different ways to create and import new customer lists.

New Customer List ✕

New List
Create a blank list from scratch.

New List from File
Create a list from a file.

New List from External Source
Create a list using external source.

New List from a template
Create a list with fields needed by the selected template.

New List from another list
Create a list with same fields as another list

Create a new list only if you have no existing data

Most commonly used option. Import and choose a list from a file located on your computer saved in any of the formats displayed

Create a new list from a file uploaded on the cloud

Create a new list with fields required by a selected template

Create a new list using fields from an existing list

Select file ✕

Choose File | No file chosen

File type

- MS Excel (.xlsx)
- Pipe delimited file (.csv, .txt)
- Tab delimited file (.csv, .txt)
- Comma delimited file (.csv, .txt)
- Comma delimited file for Mac(.csv, .txt)

Upload file

New customer data list ✕

Data list name

Marketing List

Columns

Add column

Col	Heading	Validation	
A	Name	Text	✕
B	Surname	Text	✕
C	Cellphone	Phone number	✕
D	Email	Email	✕
E	MonthlyIncome	Numeric	✕

Save

Give your list a name

Add columns to your list

Select the correct validation for each heading according to the data you will be inputting

Note: You need to include a cellphone number field otherwise you will not be able to send your campaign.

Customer list dashboard

Get to know the customer list interface and how to add and edit customers.

The screenshot shows the Mobiz Customer list dashboard. The interface includes a sidebar with navigation options: Campaigns, Templates, Files, Customers, and Analytics. The main content area displays a 'Marketing List' with a table of customer data. Annotations provide detailed instructions on how to use various features:

- Import:** An annotation points to the 'Import' button, with a callout box listing 'Insert Row' and 'Add Field'.
- Manage Fields:** An annotation points to the 'Manage Fields' button, with a callout box listing 'Change Field Names' and 'Change Field Types'.
- Search:** An annotation points to the 'Search' button, with a callout box stating 'Search according to the field headings'.
- Sort:** An annotation points to the 'Sort by' dropdown, with a callout box stating 'Sort by the different field headings'.
- Export:** An annotation points to the 'Export' button, with a callout box stating 'You can also add conditions before exporting to save only the entries you need' and a reference to 'See page 22 for more about conditions.'.
- Export Options:** A callout box titled 'Export customer list' shows the 'Estimated row count: 5', a 'Manage Filter' button, and a 'File type' section with radio buttons for: MS Excel (.xls, .xlsx), Pipe delimited file (.csv, .txt), Tab delimited file (.csv, .txt), Comma delimited file (.csv, .txt), and Comma delimited file for Mac (.csv, .txt).
- Table Controls:** An annotation points to the 'Show' and 'Reset' buttons, with a callout box stating 'Reset back to default view'.
- Row Selection:** An annotation points to the checkboxes in the 'Functions' column, with a callout box stating 'Select specific rows to edit or delete'.
- Table Actions:** An annotation points to the 'Check All / Uncheck All' and 'With Selected: Edit / Delete' links, with a callout box stating 'Check/uncheck all the rows' and another stating 'Edit or delete the selected rows'.

Functions	ID	Title	Name	Surname	Cellphone	Email	Gender	City	BirthDate
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	1	Mr	Vuyo	Dhlamini	27826786845	vdhlamini@gmail.com	Male	Johannesburg	1979
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	2	Mrs	Susan	Burkett	27769873456	susanburkett@yahoo.com	Female	Cape Town	1990
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	3	Ms	Lelethu	Khumalo	27763458734	lelekhumalo@gmail.com	Female	Port Elizabeth	1998
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	4	Mr	Keenan	Jacobs	27823457734	keenanj@hotmail.com	Male	Durban	1986
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	5	Ms	Janet	Venter	27829735759	janetventer@gmail.com	Female	Pretoria	1972



Interface

Get to know the campaigns interface and how to setup a campaign.

The screenshot shows the Mobiz Campaigns interface. The left sidebar contains navigation options: Campaigns, Templates, Files, Customers, and Analytics. The main content area is titled 'My Campaigns > Marketing' and features a 'New Campaign' button. Below this is a table of campaigns with columns for Name, Sent, Delivered, Unique CTR, and Spent. Annotations include:

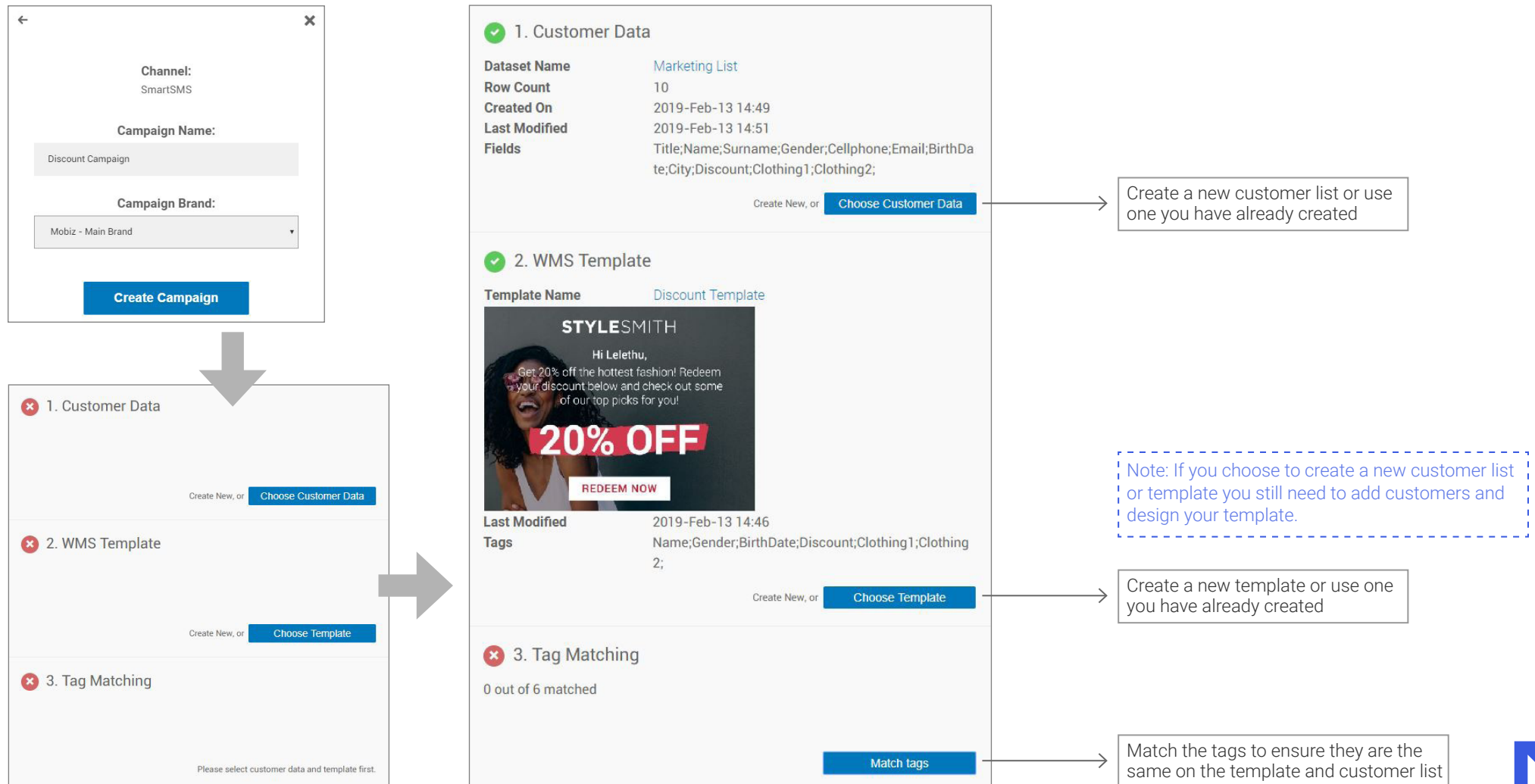
- Folder Functions:** A box listing 'Add Folder', 'Move Folder', and 'Rename Folder' points to the 'Folder Functions' section.
- Create a new campaign:** A box pointing to the 'New Campaign' button.
- Sort By:** A box pointing to the 'Sort By' dropdown menu, which shows options: 'Create time : Newest First', 'Name : A - Z', 'Name : Z - A', 'Create Time : Oldest First', and 'Create time : Newest First' (highlighted).
- Setup Required:** A box pointing to a gear icon next to the 'Survey Campaign' row, with a note: 'Campaign that has not been setup yet'.
- Setup Menu:** A box listing 'Setup', 'Rename Campaign', 'Move Campaign', and 'Delete Campaign' points to the gear icon next to the 'Winter Launch Campaign' row.
- Analytics:** A box listing 'View', 'Analytics', 'Rename Campaign', 'Duplicate Campaign', 'Move Campaign', and 'Delete Campaign' points to the gear icon next to the 'Discount Campaign' row.
- Table Headers:** Arrows point from the table headers to descriptive boxes:
 - 'SmartSMS - Created On 2019-02-13' points to 'The campaign channel'.
 - '11897 Sent' points to 'Number of SmartSMSs sent'.
 - '8293 Delivered' points to 'Number of SmartSMSs delivered'.
 - '19% Unique CTR' points to 'The unique click through rate'.
 - 'R2169.345 Spent' points to 'Money spent on campaign'.



Create a new campaign

SmartSMS

Create an SMS with a web-enabled link that takes users to a personalised landing page.



Create a new campaign

SmartSMS

Create an SMS with a web-enabled link that takes users to a personalised landing page.

Matching Tags

Before you can complete the setup for your campaign, Mobiz needs to ensure that the tags in your template match the field headings in your customer list. If your tags and field headings have the exact same text, then Mobiz can easily auto match them, however sometimes you may have used a different word and Mobiz is unable to match them. In this case you will need to manually match them to ensure that they are the same.

Tag Matching

Match All

— Matched — Not matched — Auto matched

Tags	Customer Data
{{Name}}	Name (auto)
{{Gender}}	Gender (auto)
{{BirthDate}}	BirthDate (auto)
{{Discount}}	Discount (auto)
{{Clothing1}}	Clothing1 (auto)
{{Clothing2}}	Clothing2 (auto)

An example of tags that have been auto matched by Mobiz

Tag Matching

Match All

— Matched — Not matched — Auto matched

Tags	Customer Data
{{FirstName}}	Click to assign data
{{DateofBirth}}	Click to assign data
{{VoucherDiscount}}	Click to assign data
{{ClothingOne}}	Click to assign data
{{ClothingTwo}}	Click to assign data

An example of unmatched tags

Select 'Match All' to match all the tags at once, or 'Click to assign data' to match each tag individually

Matching 1 of 5

{{FirstName}} ← Not matched

Keep OR choose one from the following

Title	Name	Surname
Gender	Cellphone	Email
BirthDate	City	Discount
Clothing1	Clothing2	

Match the tag by choosing the corresponding field name, in this case {{FirstName}} can be matched to {{Name}}

Tag Matching

Match All

— Matched — Not matched — Auto matched

Tags	Customer Data
{{FirstName}}	Name
{{DateofBirth}}	Click to assign data
{{VoucherDiscount}}	Discount
{{ClothingOne}}	Clothing1
{{ClothingTwo}}	Clothing2

If you have a tag that cannot be matched to any of the field names, you will need to go back to your template and remove the tag or create that field name in your customer list

3. Tag Matching

5 out of 5 matched

Match tags

Once all your tags are matched you can complete the setup of your campaign



SmartSMS Campaign Interface

Get to know the campaign interface.

The screenshot shows the Mobiz SmartSMS Campaign Interface. The interface is divided into several sections:

- Left Sidebar:** Contains navigation options: Campaigns, Templates, Files, Customers, and Analytics.
- Header:** Displays the user's name (Hi, John Smith), credit balance (Credit: R0), and a notification bell.
- Main Content Area:**
 - Discount Campaign:** Features a "Create SmartSMS Engagement" button.
 - Analytics Overview:** Shows "Total Sent (0)" and a table with columns for Total Sent, Total Delivery, Delivery Rate, Total CT, Unique CT, and Unique CTR. The table data is as follows:

	Total Sent	Total Delivery	Delivery Rate
10	0	0	0.00%
8	0	0	0.00%
6	0	0	0.00%
4	0	0	0.00%
2	0	0	0.00%
 - SMS Batches:** A section for viewing sent SMS batches.
 - Automations:** Includes an "Add Automation" button.
 - Preview / Social Media Sharing:** Shows "No Preview Info".
 - Link Security:** Shows "No Link Security".
- Bottom:** Includes "Add Info" and "Add Link Security" buttons.

Callouts and annotations provide further details:

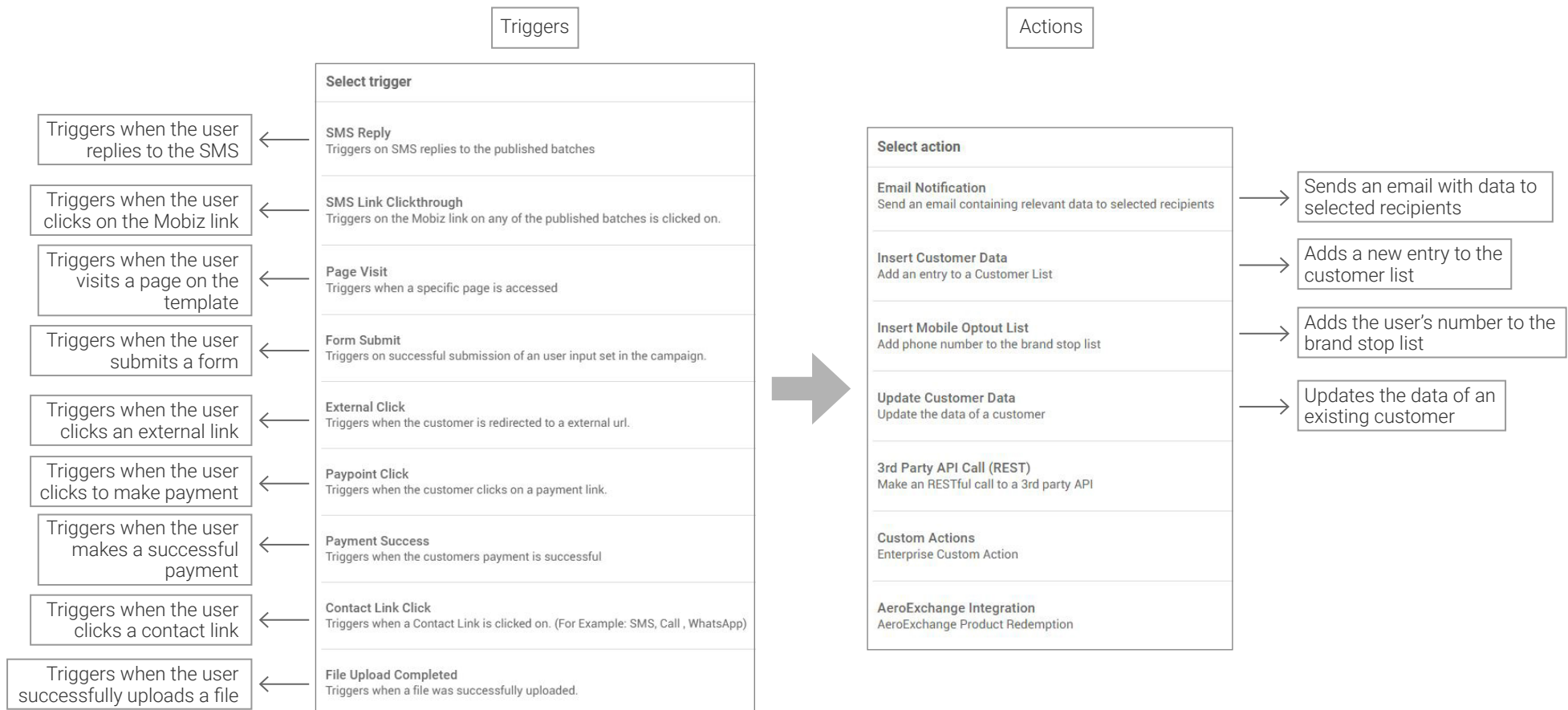
- Customer list:** Points to the "Files" option in the sidebar.
- Template:** Points to the "WMS Template" section in the sidebar.
- Every time you edit the template you need to re-match the tags to ensure the campaign being sent is the latest version:** Points to the "Re-match tags" link in the "Campaign Details" section.
- Send a test campaign or send campaign to customers:** Points to the "Create SmartSMS Engagement" button.
- Analytics overview:** Points to the analytics table.
- This is where it will show the SMSs you have sent:** Points to the "SMS Batches" section.
- Add automations here:** Points to the "Add Automation" button.
- Add link security:** Points to the "Add Link Security" button.
- Add a social media preview or video:** Points to the "Preview / Social Media Sharing" section.
- See page 33 to find out more about automations:** A dashed blue box pointing to the "Automations" section.
- See page 34 to find out more about social media previews:** A dashed blue box pointing to the "Preview / Social Media Sharing" section.
- See page 34 to find out more about link security:** A dashed blue box pointing to the "Link Security" section.



SmartSMS

Automations

Automations are triggers that happen when the user interacts with the SMS or template.



SmartSMS

Preview and link security

Add a preview that displays underneath the SMS text on some phones or when users share the campaign to others. Link security offers peace of mind to the user when sending statements by asking for a specific password before users can access the template.

Type a title for the preview here

Paste the video URL here

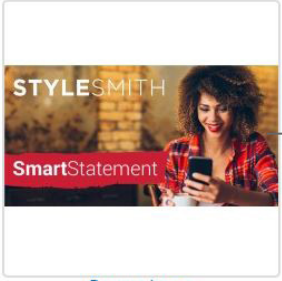
Add a description from the preview here

Social Media ✕

Title

Video URL

Description



Remove Image

Add the image preview here

Use this to add personalisation to the security question, by selecting the field name and 'Add Column'

Add the security question here

The answer needs to be an existing field name in your customer list

Type the response for when the user inputs the incorrect answer

Type the response for when the user inputs the incorrect answer a few times

Link Security ✕

▼ Add Column

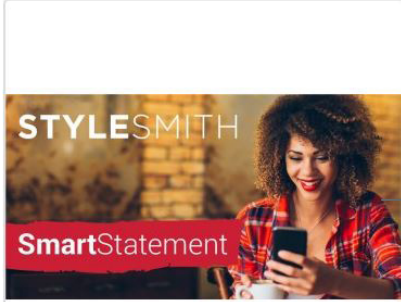
Security Question

Answer Column

 ▼

Error Response

Support Response



Add an image to display here



SmartSMS

Campaign testing

Before you send your campaign, test it first to ensure that everything is working correctly.

Create SmartSMS Engagement

Create New Batch

Test Campaign
Manage and send the campaign to test users

Create Bulk Send (Current Data)
Send the campaign to targeted users

Add New Tester

Use Random Values

Title: Ms
Name: Lelethu
Surname: Khumalo
Gender: F
Cellphone: 0825873467
Email: lelekhumalo@gmail.co

Save

Choosing to use random values will grab one entry from the customer list. Make sure to add your own cellphone number or a colleague's

Make sure to fill in your cellphone number or a colleagues here

Campaign Testers

Add Testers Import from File

Functions	Active	ID	Title	Name	Surname	Gender	Cellphone	Email	B	
		<input checked="" type="checkbox"/>	11	Ms	Lelethu	Khumalo	F	27825873467	lelekhumalo@gmail.com	1
		<input checked="" type="checkbox"/>	12	Mr	Jason	Swart	M	27825873467	jswart@yahoo.com	1
		<input checked="" type="checkbox"/>	13	Mrs	Lauren	Burkett	F	27825873467	lauren@gmail.com	1
		<input checked="" type="checkbox"/>	14	Mr	William	Dhlamini	M	27825873467	willdhlamini@hotmail.com	1

Create Test Batch

Add testers manually or import from a file

Choose to make certain testers active or inactive

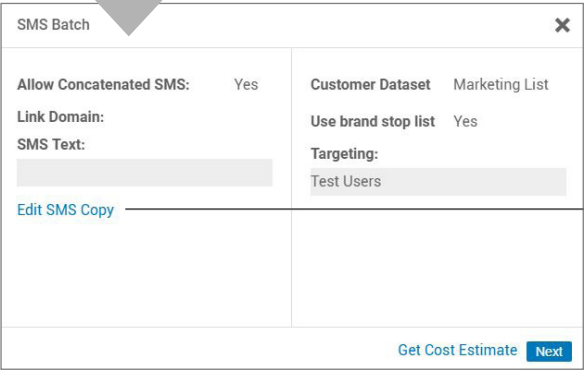


SmartSMS

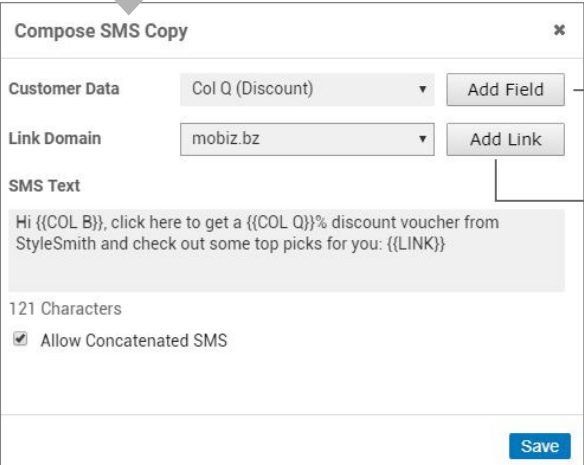
Campaign testing

Before you send your campaign, test it first to ensure that everything is working correctly.

Create Test Batch



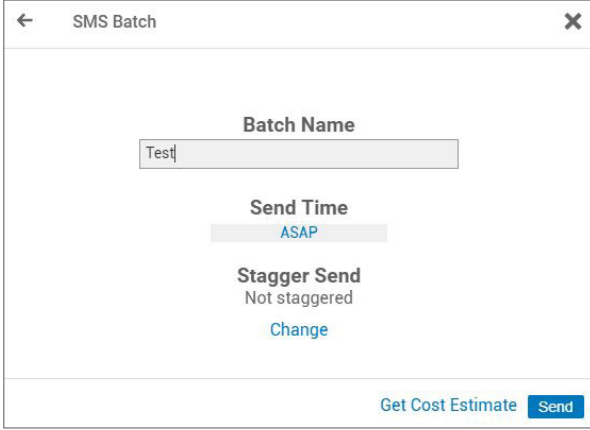
Click here to edit the SMS copy for your test



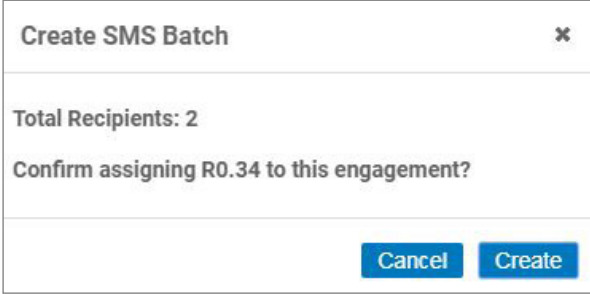
Add personalisation to your SMS text by selecting the field heading and 'Add Field'

Choose your preferred link domain and select 'Add Link' to add in the Mobiz link

Do not manually type in the field headings you want to use, such as {{Name}}, you need to use the 'Add Field' function.



Click here to edit the SMS copy for your test

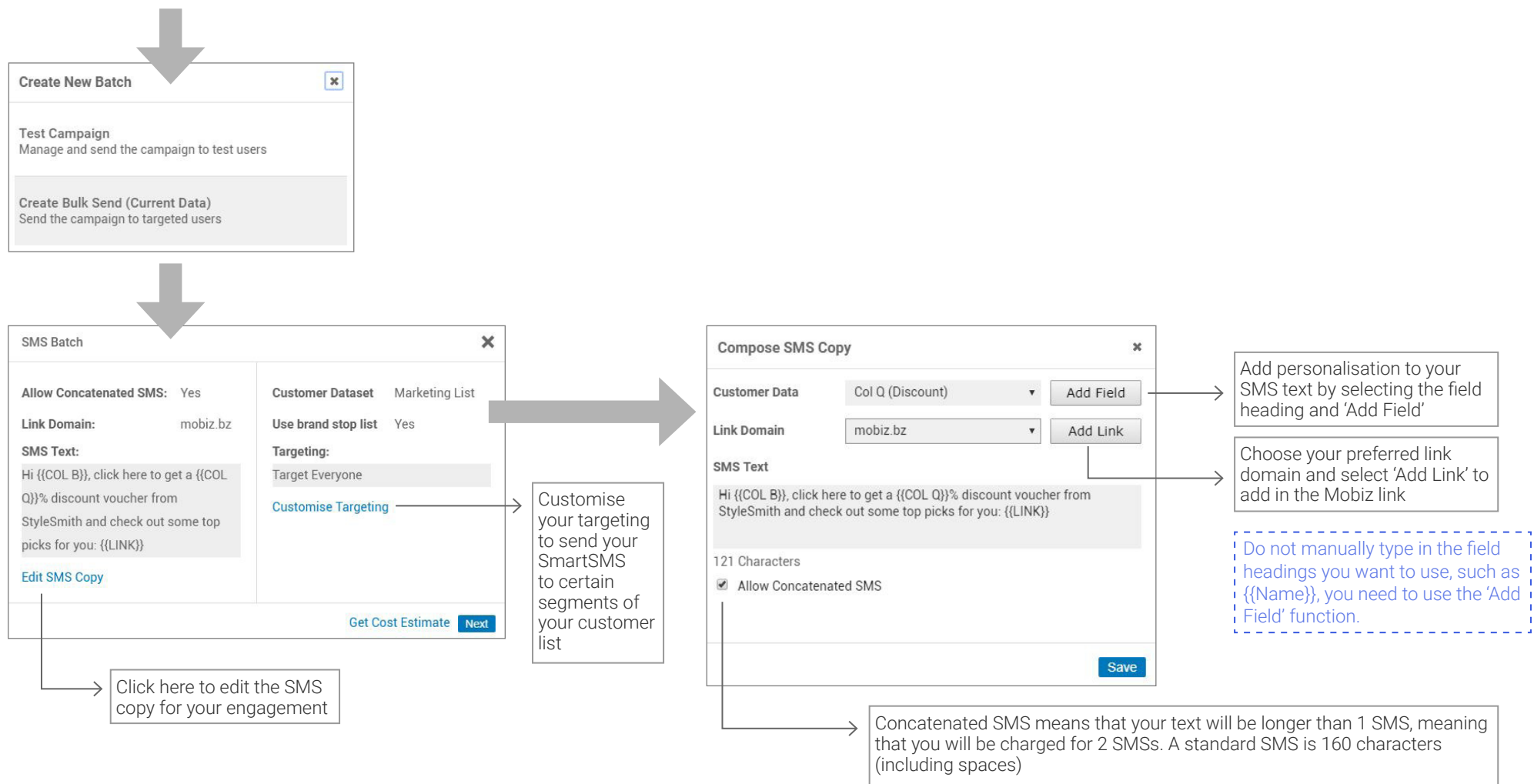



SmartSMS

Sending engagements

Engagements are when you send your SmartSMS to your customers.

Create SmartSMS Engagement



SmartSMS

Sending engagements

Engagements are when you send your SmartSMS to your customers.

Customise targeting

Customised targeting gives you the option to send your SmartSMS to a specific segment or segments of your customer list.

Customise Targeting

Use Stop List

[Manage Targeting](#)

Targeting

Targeting Everyone

➔

Targeting ✕

Title ▼ Add Parameter

➔

Customer Data

Title

Name

Surname

Gender

Cellphone

Email

BirthDate

City

Discount

Clothing1

Clothing2

Row ID

Access Data

Handset Type

Errors

Base your targeting on customer data (the field names on your customer list) or access data (handset type or errors from previous campaigns)

Once you have selected your targeting, get a cost estimate to see how much your campaign will cost to send

[Get Cost Estimate](#)

Cost Estimate ✕

Targeting

City = Cape Town (1)

Standard SMS		Concatenated SMS	
South Africa	1	R0.17	
Total (Standard SMS Only)		R0.17	
Total (Include Concatenated SMS)		R0.17	

[Close](#)

Targeting Examples

City	=	▼ Cape Town	✕	➔ This targets only customers from Cape Town
BirthDate	fromTo	From 1999 To 1994	✕	➔ This targets customers between the ages of 20 and 25
Handset Type	onlySmartPhone	▼	✕	➔ This targets customers with a smartphone



SmartSMS

Sending engagements

Engagements are when you send your SmartSMS to your customers.

← SMS Batch ×

Batch Name
Campaign Send1

Send Time
ASAP

Stagger Send
Not staggered
Change

Get Cost Estimate **Send**

Give your campaign an appropriate name

Choose to send your campaign immediately or schedule it for later

Schedule batch ×

Date: 14-02-2019

Hour: 10h00 Minute: 42

Send ASAP

Send In: 11 hours, 59 minutes

Set

You can also choose to stagger the send of your campaign

Stagger Send ×

Number of batches
2

Minutes Apart
15 minutes

Exclude time
Exclude Time
00h00 - 00h00

Remove **OK**

Create SMS Batch ×

Excludes:
Invalid numbers: 9
Total Recipients: 1

Confirm assigning R0.17 to this engagement?

Cancel **Create**

When you are ready to send your campaign you will be prompted to confirm the number of recipients and the cost

View your sent batches on the campaign dashboard

SMS Batches

Status	Batch Name	Cost	Recipients	Deliveries	Unique CT	Scheduled Time
Active	Campaign Send1	R0.17	1	0	0	⚙️
Active	Test	R0.34	2	2	0	⚙️

Rename

View SMS Text

View Targeting

Pause

Stop

Get Report



Accessing reports

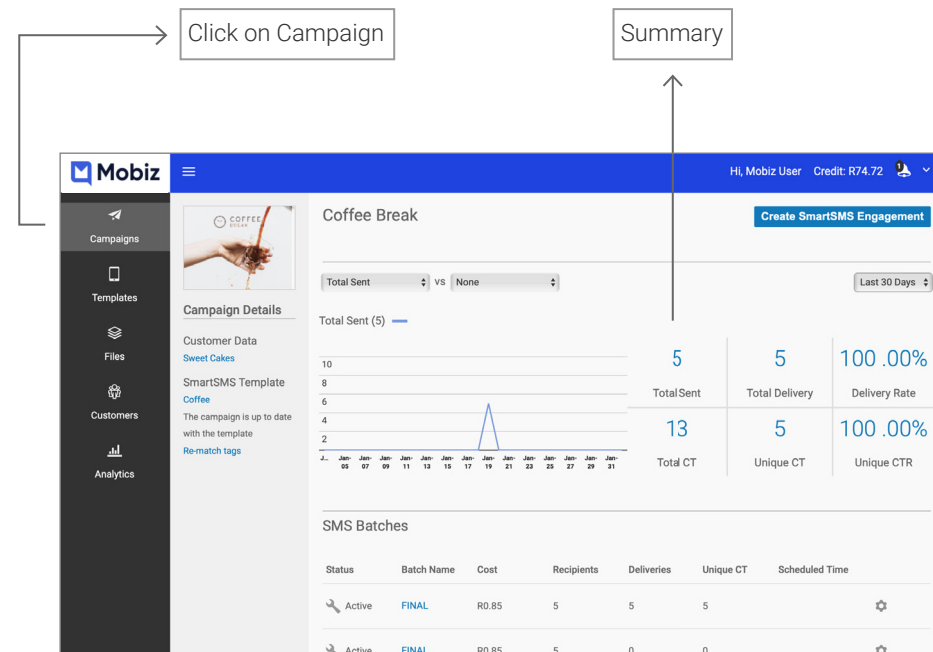
The Mobiz reporting features enables clients to keep track of key metrics in their campaigns - users are able to track a multitude of actions performed by campaign recipients such as click through rates, page views, users inputs, external links visited and much more.

1. How to access reports

There are two ways to access reports on the platform.

A. Via the campaign dashboard

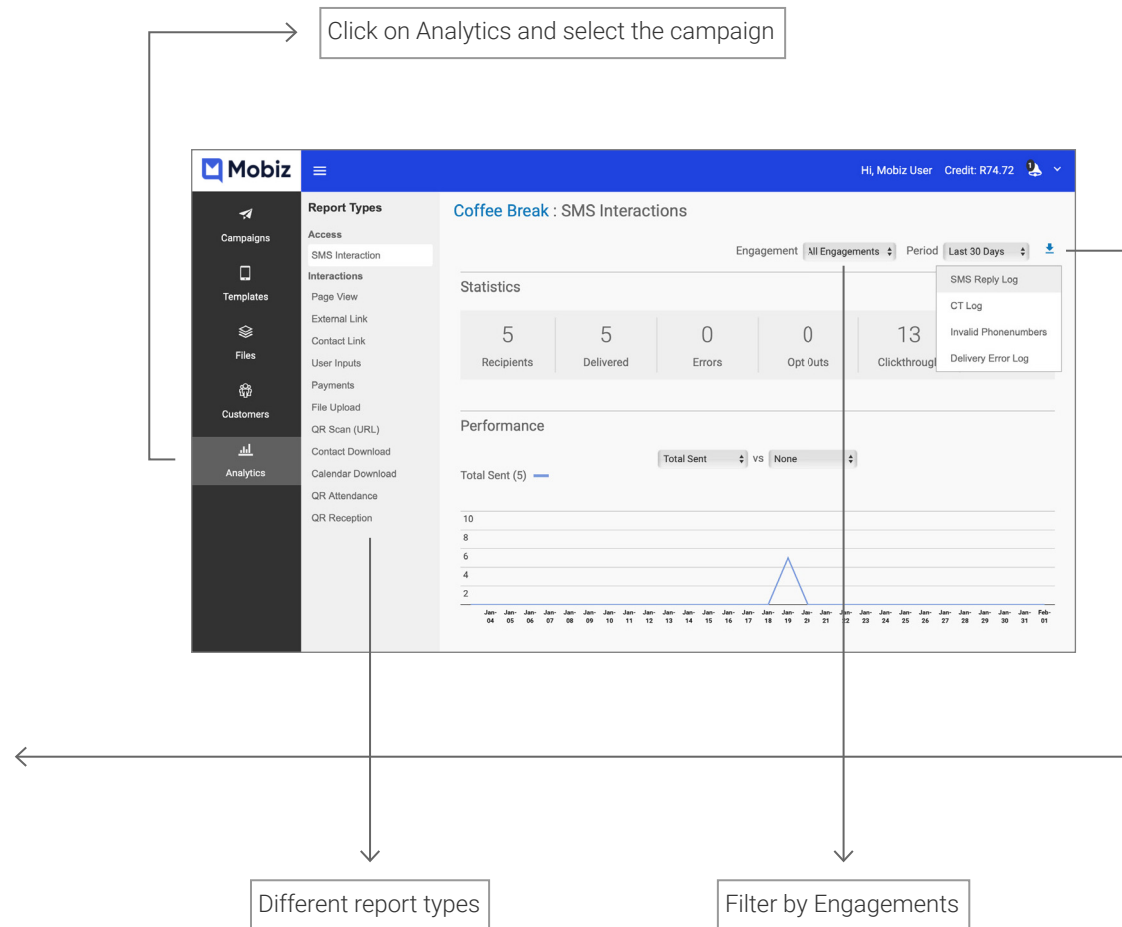
1. Login to the Mobiz platform.
2. Your campaign will be listed - select one of the campaigns.
3. You will now be presented with a summary of the campaign analytics - if you click on any of the metrics a details report will be presented to you (e.g. Total Sent).



Accessing reports

B. Via the side navigation menu

1. Log in to the Mobiz platform.
2. Select Analytics from the side navigation menu.
3. Your campaign will be listed - select the campaign of interest.
4. A sub-menu will be displayed showing different report types, to the right of the main side navigation menu.
5. Select one of these options, e.g. User Inputs.
6. Filter by Engagements and Period in the top right - Period can be one of the predefined values or a custom value.
7. Click the download button and you will be presented with a modal allowing you to customise the report further.

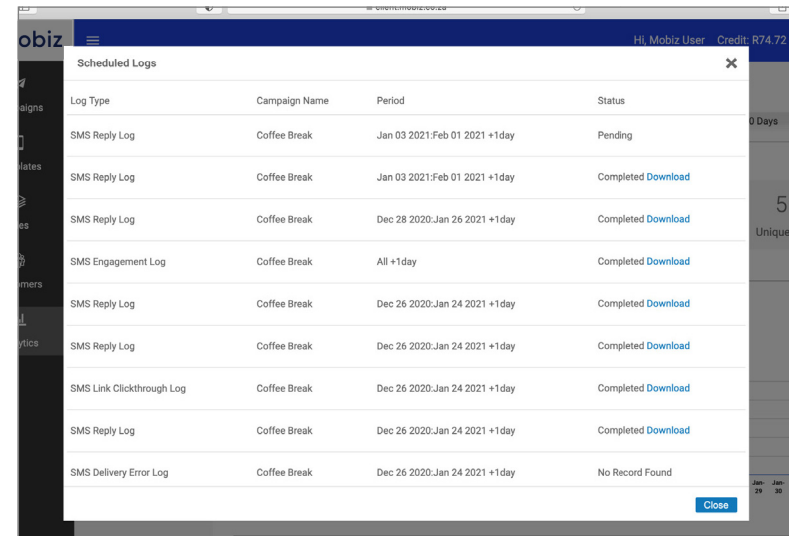
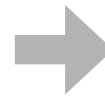
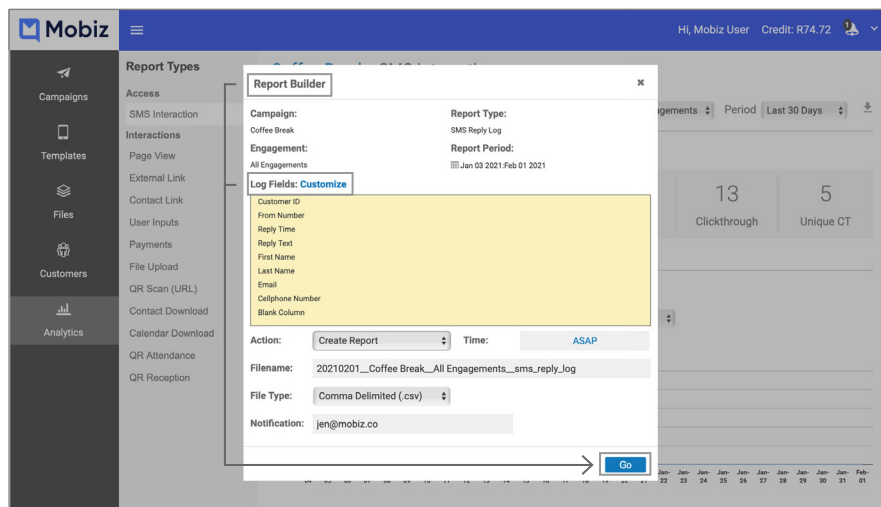


Accessing reports

2. Report Builder/Scheduled Logs

On this Report Builder modal, you can choose the fields you would like, the action you would like to perform (Create and download a report or upload a report to an FTP server), as well as the file format and name.

Once you click the Go button, a Scheduled Logs screen will then be presented to the user. Each of the logs will have a status attached to them, either Cancel or Download - once the status of the 'Download' is available you may then download the report.



Accessing reports

How to read the dashboard

When viewing the dashboard for a campaign, there are 7 metrics under the statistics section which give an overview of your campaign performance.

5	5	0	0	13	5
Recipients	Delivered	Errors	Opt Outs	Clickthrough	Unique CT

Recipients - These are the total number of recipients in the client database to which the SMS was sent.

Delivered - The total number of recipients to which the SMS was successfully delivered.

Errors - The total number of recipients to which the SMS could not be delivered.

Replies - The total number of direct replies to the SMS.

Opt outs - If the SMS had an opt out option, the total number of recipients who opted out of the campaign.

Click through rate - The total number of click throughs, i.e. clicked the embedded link in the received SMS to view the campaign.

Unique click through rate - The same as click through rate, except that duplicate click throughs by the same recipient are excluded.



Reporting types

1. SMS Interaction

When viewing the analytics page, and choosing SMS interaction from the sub-side navigation menu, then choosing the drop down on the top right, the user will be presented with various SMS interaction reports, namely:

- **Click Through Log** - A list of all recipients who clicked through, as well as the date and time which they clicked through.
- **Invalid Phone Numbers** - A list of recipients who had invalid phone numbers in the client database.
- **Delivery Error Log** - A list of delivery errors with status codes - the status codes in this report will match one of the below statuses.

2. Interactions

Page View - A template consists of one or more pages - the Page View reports allows the user to see statistics relating to which pages were viewed by recipients.

External Link - If a template contains external links, this report provides details on recipients click throughs on these links. It is important to note that this is not the link in the SMS which takes the recipient to the campaign, but rather external links embeded within the campaign itself (eg. a campaign may contain a link to the brand's Facebook business page).

Contact Link - A template may contain contact details such as a phone number or WhatsApp link - this report will provide stats on interactions with this contact link.

User Inputs - Statistics on custom inputs or form fields completed by users, e.g. Surveys or questionnaires.

Payments - Logs relating to integrated payments made within a campaign via one of the Mobiz payment partners.

File Uploads - Details on any files uploaded by recipients via the campaign, e.g. a user may have been asked to upload a copy of their ID.

QR Scan (URL) - Oftentimes campaign landing pages can be accessed via a QR code rather than via an SMS with a link - this report provides details on campaigns accessed via users scanning a QR code.

Contact Download - If any contact details are embedded within a campaign, this report would provide statistics for downloads of this contact - this differs to the Contact Link report explained above and is more analogous to one user sharing contacts via their cellphone.

Calendar Download - Calendars containing dates relevant to a campaign (e.g. a campaign may contain a calendar highlighting days when stores may be running a special) - this report would provide details on recipient downloads of this calendar.



Delivery status

The below table details the various delivery statuses, as well as what each status means.

DELIVRD - Refers to the successful submission of the SMS to the handset. The cellular network reports the status.

UNDELIV - Refers to the unsuccessful submission of the SMS to the handset, caused by inactive or unreachable numbers. The cellular network reports the status.

EXPIRED - Refers to no status update being received within the validity period. This is usually caused by the handset being off, going to voicemail, being redirected, or the handset being out of network reach.

SUBMITD - The SMS has been submitted to the cellular network for delivery. We are waiting for a status update from the cellular network.





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