



# Texting for Business App Quick Reference Guide



*Approved Contact V2 24Q4*

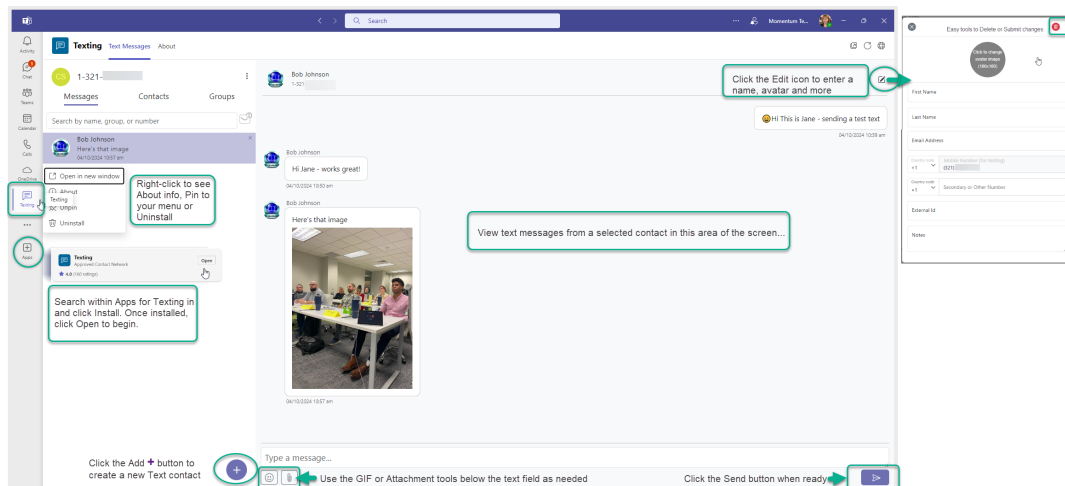
# 1. Introduction

This document provides guidance for users to effectively utilize their Texting app (\$) within Microsoft Teams.

**NOTE: Throughout this document, Phone numbers have been intentionally blocked out.**

## 1.1 Overview of Texting Using Teams

- Texting allows you to send/receive text messages from your work phone numbers.
- Creates an easy way for you to use a work number for texting instead of your personal mobile phone.
- All the features of your smart phone available from your business line.



## 2. The Basics

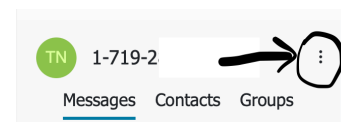
### 2.1 Prerequisites

Prior to utilizing Texting for Teams, ensure that you have:

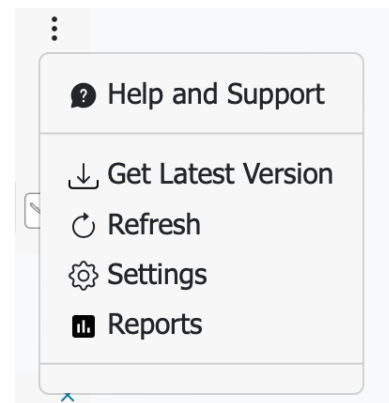
- An active Microsoft Teams account
- An active Texting subscription license
- Your number has already been set up by your Teams Admin
- Your number is either installed in your sidebar or in a Teams Channel.

### 2.2 Getting Started with Your Texting Account

1. Login to your Microsoft Teams account as usual.
2. Access either your Channel Texting app or your sidebar texting app. (The apps will appear the same once opened) **NOTE: On the Channel texting app, multiple users (anyone with access to the channel) can read and respond to texts sent/received - it's like a group text.**
3. First, let's make sure you are all set for NOTIFICATIONS.  
**NOTE: App notifications for Teams has a global/org setting that will need to be enabled. If ANYONE on the team is getting notifications for the Texting app, that means this is likely all good. But if no one is getting it, we'll want to check the app's global settings.**
4. Tap on the **More** (three dots) menu to the right of your phone number to view the menu options.

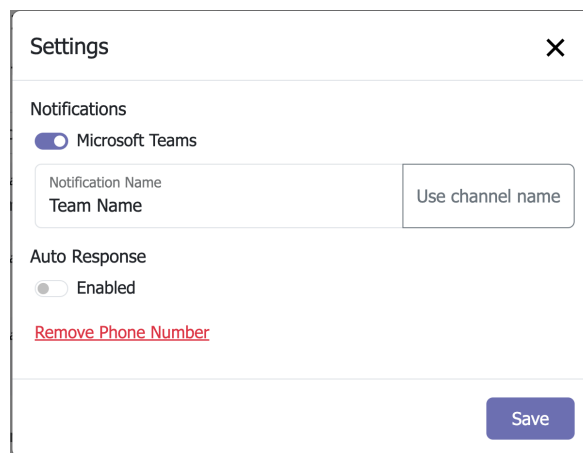


- **Help** – this takes you to a web page that has some frequently asked questions and information for how to reach out to Approved Contact.
- **Get Latest Version** – this simply ensures that you are on the latest version of the application. While this is automated, there are circumstances that can cause your app version to fall behind. If you are experiencing something strange or if you are missing a feature that you believe to be released, this is a good option for the first step of troubleshooting.
- **Refresh** – this will refresh your phone number, ensure all messages are up to date and that all your outbound texts have been sent.
- **Settings** – there are a couple settings here that can be managed for your phone number. We'll look at those below.
- **Reports** – (Optional / Org setup) allows you to see both your inbound/outbound messaging volume and messaging specifics on a month-by-month basis.



5. Click on **Settings > Notifications**.

- **Notifications** will be defaulted and toggled to **ON**. *This enables the ability to utilize the Teams notifications out of the box.*
- **Notification Name** - Define the notification name you'll see, or click Use channel name if you prefer.
- **Auto Response** - Set to ON / Enabled to set an automatic text response any time you get a message. *NOTE: This is not technically allowed on person-to-person texting. Mass auto-responses are not acceptable to some providers. This feature may be turned off for your number. If not, use it sparingly and only when required. If you are using an A2P solution (campaign), you can use this freely.*
- The additional toggle for “On new messages only” allows you to auto respond to only new messages (in other words, no one would receive this auto-response twice).



6. Click on the **Reports** menu option. (**Note:** This feature, may not be available to all users).

Monthly Usage Report

Year: 2023 Month: 8

\*Please note that data may be delayed up to 5 minutes

Total Inbound: 26 Total Outbound: 16 Total: 42

From	To	Type	Time
+17379:	+1719:	Outbound	8/2/23, 5:25 PM
+17379:	+1719:	Inbound	8/2/23, 5:25 PM
+17192:	+1737:	Outbound	8/2/23, 6:13 PM
+17192:	+1737:	Inbound	8/2/23, 6:13 PM
+17379:	+1719:	Outbound	8/2/23, 6:13 PM
+17379:	+1719:	Inbound	8/2/23, 6:13 PM

On the Reports page, you can choose the **Year and Month** you'd like to review.

Based on this selection, you'll see the total inbound, total outbound, and total overall messaging counts.

You'll also see the **from** and **to** numbers along with the **time** of the messages.

*NOTE: The reports section will not be functional if you have the app data installed locally in your own Azure tenant.*

*Ask your organization's Teams Administrator if you don't see the report usage data for your phone number.*

7. Go to **Microsoft Teams > More > Settings** to view related settings for the Teams app.

*NOTE: The location of Settings in the NEW Teams interface is a little different from Classic.*

- **Notifications** - Ensure that your "General" notifications for Teams are all set here. If you are getting notifications for other Teams features, you are probably all good.

## Settings

 General

 Accounts

 Privacy

 Notifications



### Chat

Messages, mentions and reactions.

Edit

### Meetings and Calls

Control notifications and reminders during your meetings and calls.

Edit

### People

Keep track of someone's status and get notified when they appear available or offline.

Edit

### Texting

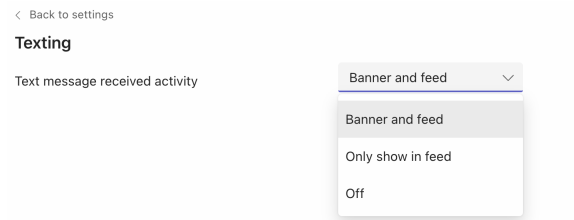
Texting allows you to send SMS/MMS text messages within Microsoft Teams.

Edit

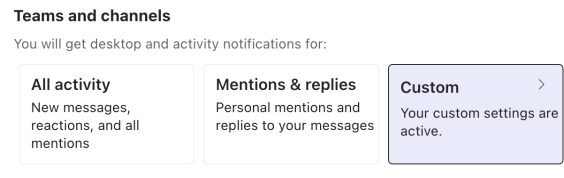
### Texting Data

**Texting** - click here to ensure the Teams app texting settings are defined as you prefer.

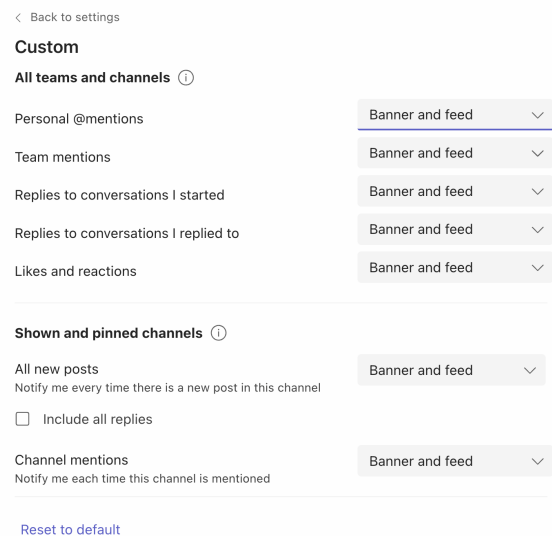
To the right of the “Texting” app – **tap the Edit button**.  
Ensure that it is **NOT set to OFF** and that it includes the notification style you’d like.  
*Most prefer “Banner and feed”.*



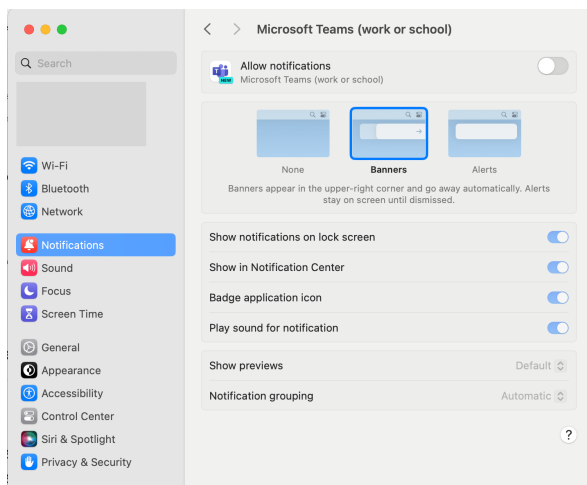
In the Teams and channels section, make sure you have “All activity” or “Custom” set for notifications.



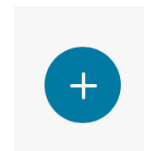
Click on the arrow in your selection to ensure that all appropriate notifications are on and set to your preferred style.



Finally, your **DEVICE** (cell phone, text-enabled device) has the proper notifications turned on. This will be a different process for Windows, Mac, Android, and iOS devices.  
*The following example will be for MAC and an iOS device. Other devices are similar.*  
Open your system settings > Notifications and choose the Teams application.



Here, you should make sure your notifications are turned on in whatever fashion suits your preference. This is the same process for Mac and iOS. Windows is similar. Make sure your notifications are on for the Teams app. Once notifications are all set up, you are ready to send and receive text messages.

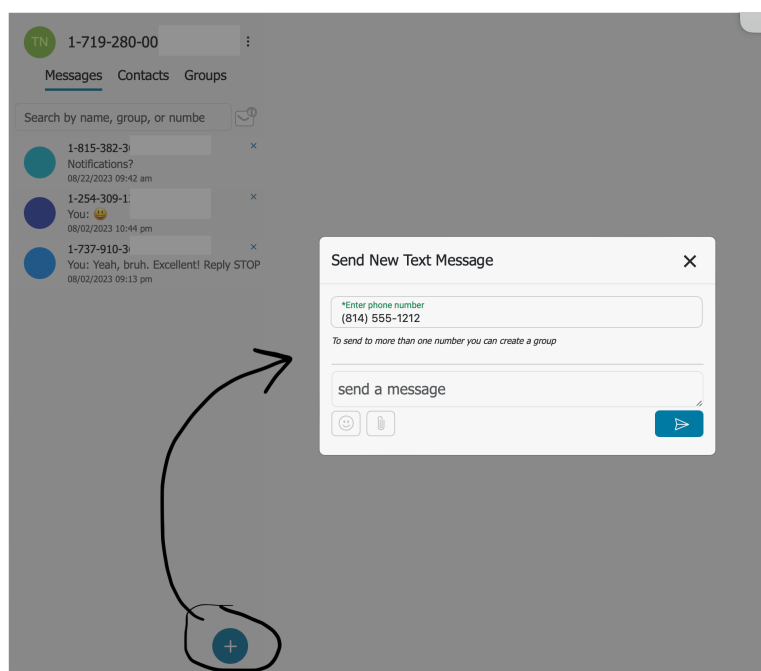


### 2.3 Send Your First Text

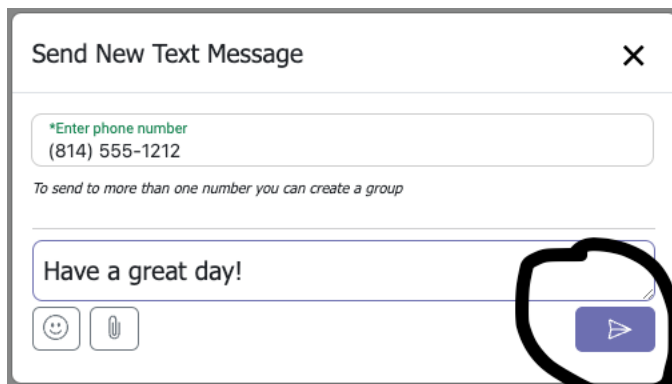
To start this process, tap the **+** button on the bottom right of the Messages tab.

*This will pop open a “Send New Text Message” dialog.*

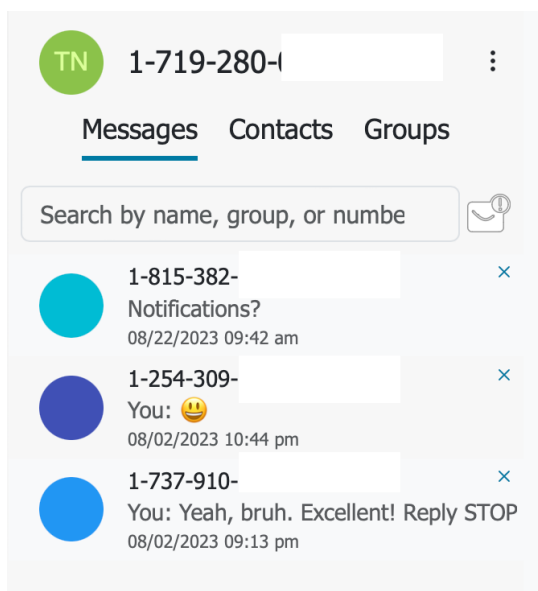
1. Enter the text enabled phone number of the person you are wanting to text.
2. Type your message in the “send a message” field.  
Tools for including emojis or attachments (only image file attachment types are supported by carriers) – make sure your file type is supported by your carrier before sending.



3. Tap the **Send** (arrow) button when you are ready to send the message.

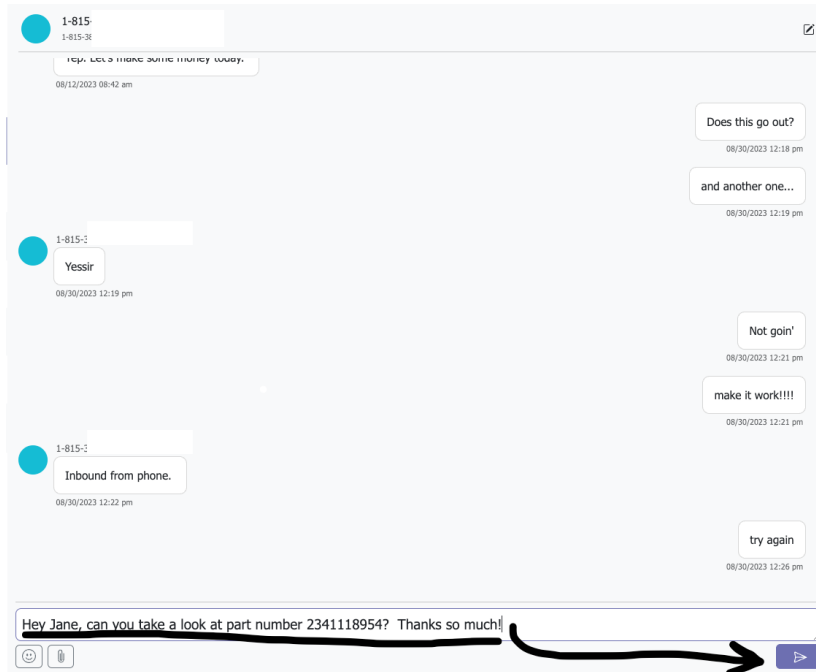


The dialog closes and your Message list updates to show the newly sent message in a list- the latest message is always at the top.



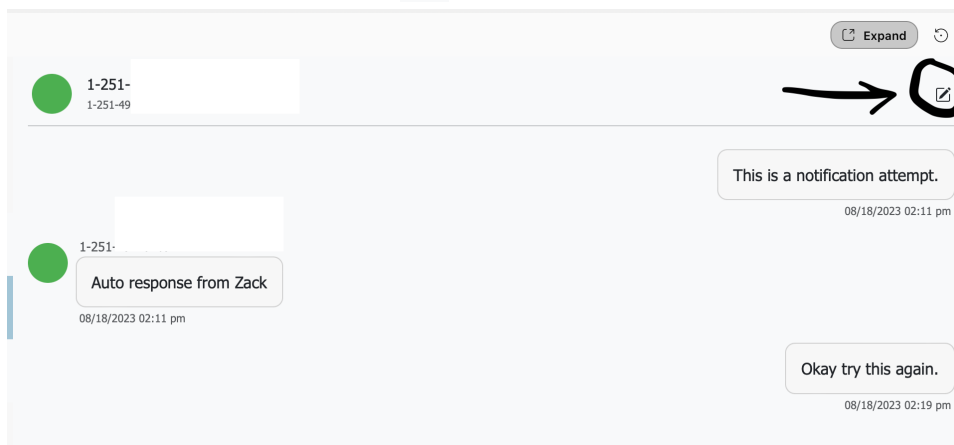
4. Select any of your messages here to view the text conversation history

From this message history view, you can also type new messages to send that phone number/contact.



Tools in this view include:

- Edit Contact - select this icon  to edit the **contact** information for this number.



A new dialog displays for data entry, such as an image, name, email, etc. for your contact.

*The mobile number field is always required and won't allow removal.*



When done, select the **green checkmark** in the upper right corner to save the information.



The Red trashcan icon allows you to **delete** added contact information, as well.

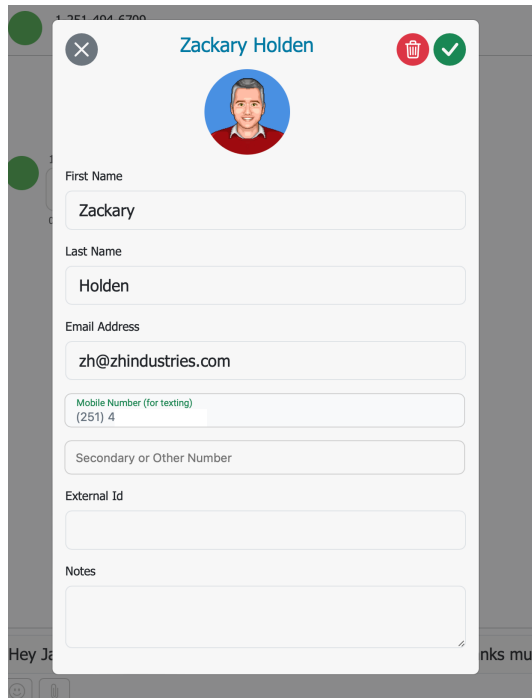
*Don't worry, if that contact does reply or send messages after deletion, you'll still receive them.*

*The app will just display the phone number until you re-add more contact information.*

As of this version, contacts are only collected and edited at the **individual phone number level**.


So, no one else will see or edit your contacts!

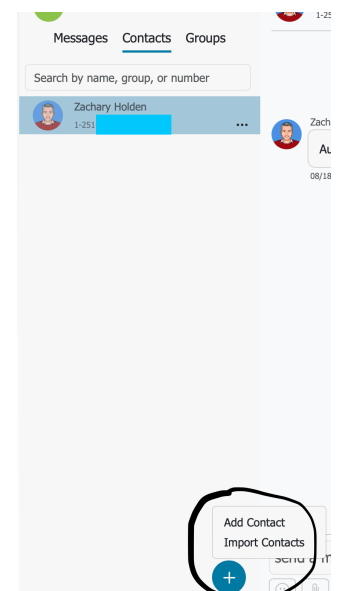
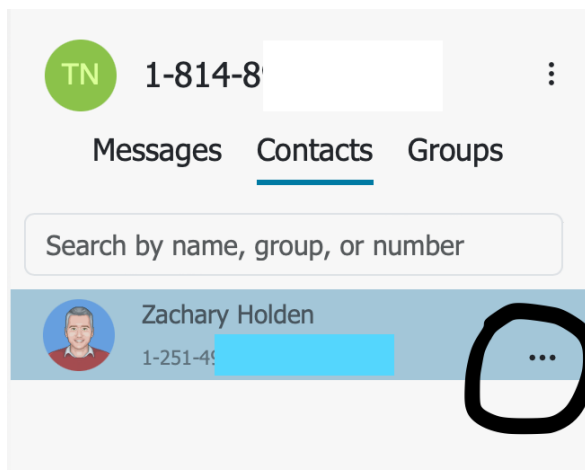




## 2.4 Basics of Contact and Group Lists and Creation

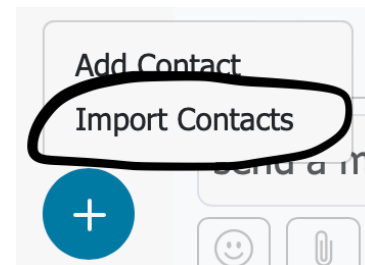
The **Contacts** tab displays an alphabetic list of your current contacts.

- You search for a contact or tap that contact to see the same, familiar, text history.
- Select the “More ...” button to the right of the contact to view, edit, or delete that contact.
- You can also tap the same icon as the messages tab  to view or edit the contact.

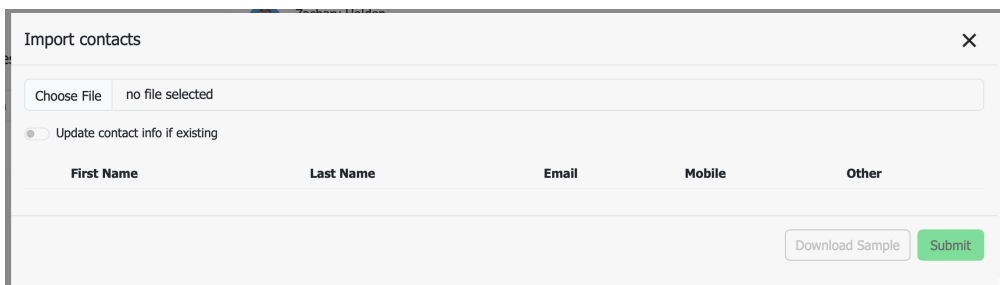


- At the bottom of the Contacts tab is the **+** button. This will allow you to add a contact from scratch or import contacts (bulk import) where allowed.

- Adding a contact will open the same screen as before. Just make sure to **provide a mobile number** and tap the **green checkmark** to save your transaction.
- **Import Contacts** - Adding contacts / numbers with the Import feature is relatively straight forward. Start by tapping **+ button** and then the **Import Contacts** menu option.



Once selected, a file selection tool displays.



- **Download Sample** - (this step is highly recommended). Choose this button to download a sample of the file format required to import your contacts. You can use this sample file to ensure the data in the file you want to upload is in the proper format before attempting an import, or as the template to build the file correctly. Just follow the steps to save the file locally and open it to view the downloaded sample in your csv application – Excel or Numbers or Google Sheets, etc. here is an example:

contacts

First Name	Last Name	Email	Mobile	Other	Notes	External Id
John	Doe	john@doe.com	12345678901	12345678901		

Make sure you populate the mobile number column – enter a simple 10-digit string of numbers. (Do not format the phone number in this column in any way or use symbols)

All the other column data points are optional, but the First and Last Name fields are helpful.

**NOTE:** The External ID is an id that allows the contact to be tied to your existing, internal application CRM. This may be useful data in the future if you ever plan to pull the data into a CRM system or to tie your information to any other system’s data for reporting. If you have that plan, you can just apply the other application’s contact id to this field. If you update a phone number with new data, the import will **OVERWRITE** the existing data for that contact.

After updating your data, save the file locally so you can pull it into your contacts.

First Name	Last Name	Email	Mobile	Other	Notes	External Id
Pete	Scolari	pete@sc.com	12345678901	12345678905	Pete is an excellent guy that helps us solve problems.	992116
Janice	Informic	janice@in.com	12345678902	12345678906	Janice is a good communicator and has 3 sons.	992321

Once your data is updated and saved locally, re-open Import Contacts and select **“Choose File”**.

Choose the **.csv file you saved** after adding your contacts.

Use the toggle to elect to update your existing contacts or not.

Now, you'll see the file name and the list of contacts and the number of contacts to be imported displays

Once you are ready, select the **“Submit”** button to upload the file contents and update your contacts.

When the process completes, your contact(s) display in your Contacts tab.

## Group Texts

You can enter multiple contacts/phone numbers for text delivery at once and send a common message to everyone you include at the same time. Within the application, you have multiple ways to utilize group texting.

- Send out a single message to multiple contacts where each response will be seen by everyone.
- Send out a single message to multiple contacts where each message is sent individually and is responded to individually.

Tools are provided to help you define which way your group texts will be sent.