

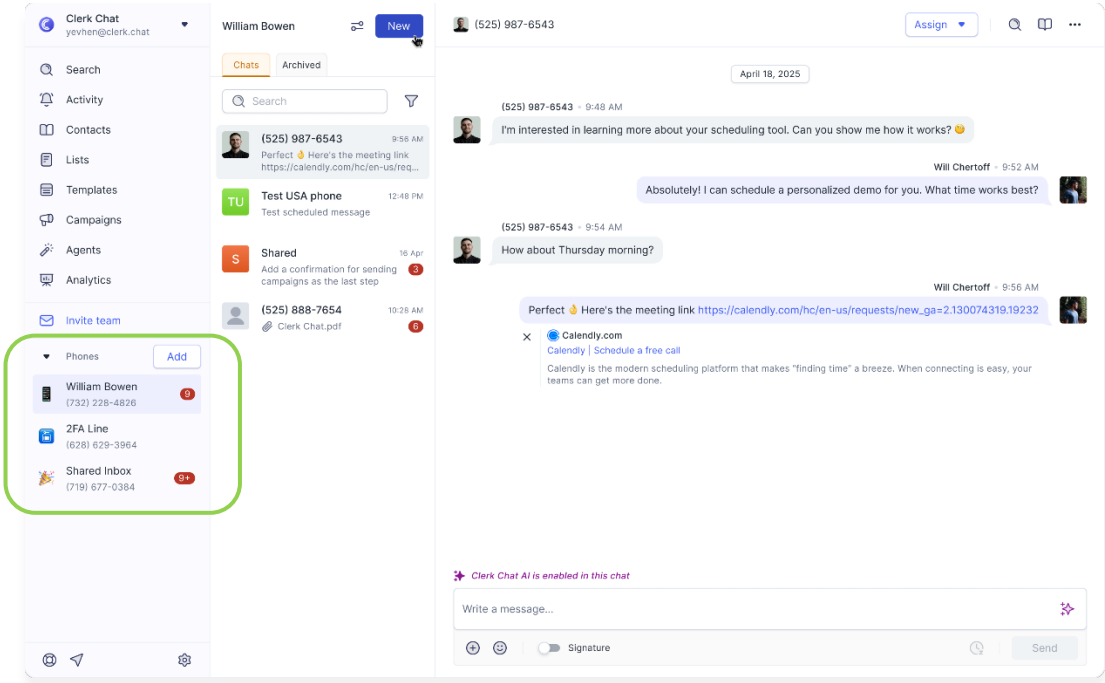
This short guide offers useful information and steps for the user-friendly Clerk Chat SMS tools.

To Send an SMS Text

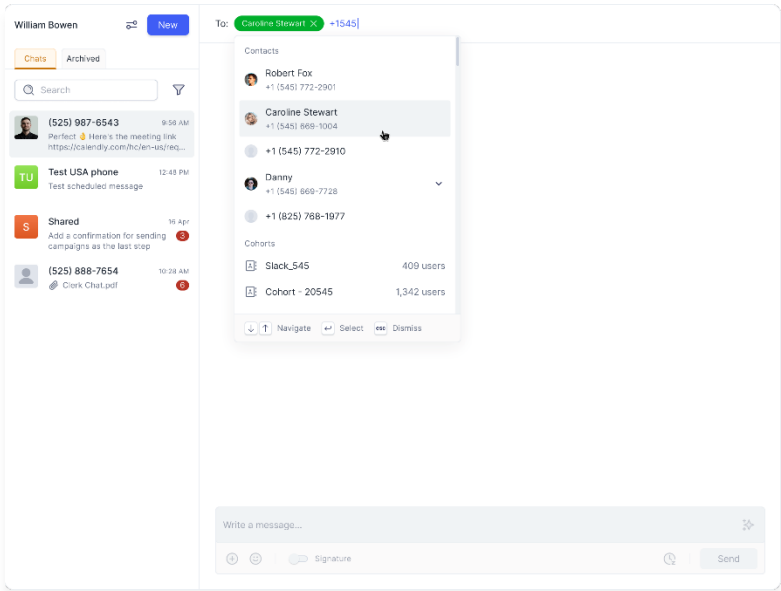
1. Select the Inbox / Phone you want to send the SMS from.

You can initiate a conversation in two ways:

- a) If it's your first-ever message, click on the **New** button located at the top of the page.
- b) You can also start a new conversation by clicking the "+" icon next to the inbox name.



2. Enter a phone number for the contact, or search for an existing contact to define who will receive your text.



3. Type your message within the data entry space provided.

Optional:

- a) Insert Templates: Place the cursor where you want it in the message. Then, click the icon for templates and select the template snippet you wish to use from the available list. Example could be [[name]] to automatically add the contact's name information from their CRM Contact data.
- b) Use Emojis: Click the emoji icon to select and add an emoji to the message where the cursor is currently.
- c) Insert a Signature: If you have created a signature in your profile, you can toggle this to on to add it.

4. When ready, press **Enter** or click on the **Send** icon to send the SMS text.

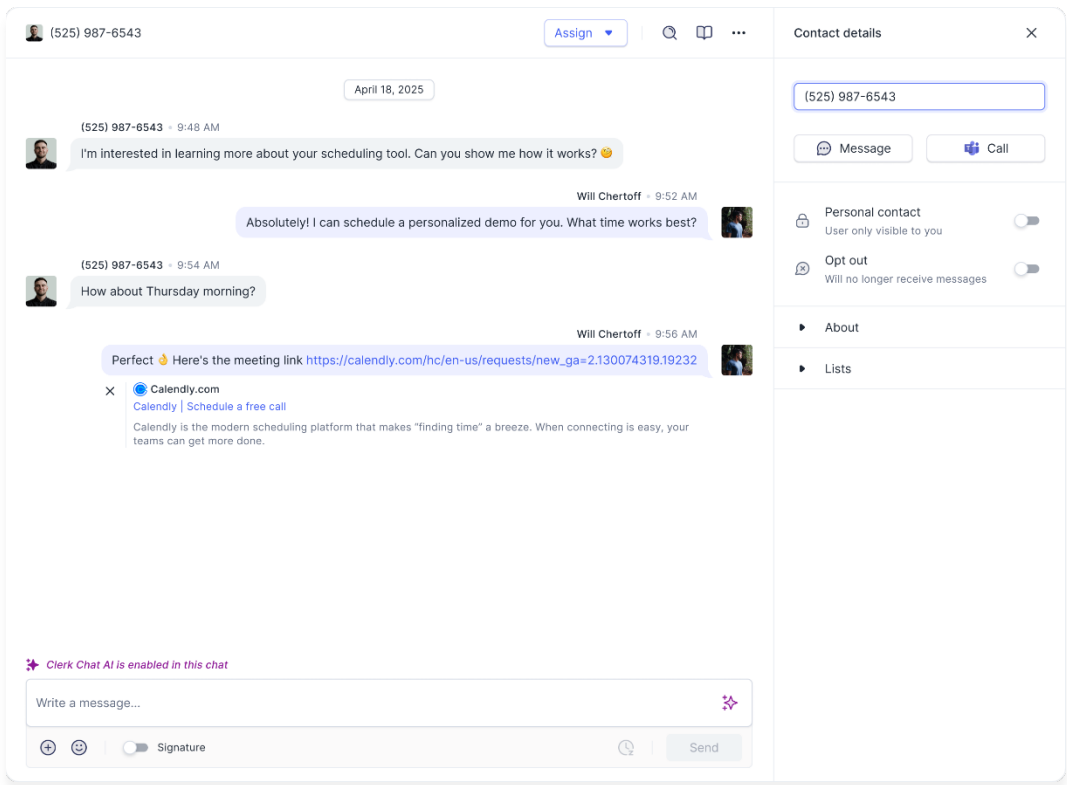
To Update an SMS Contact's Information

Once inside a conversation, you can easily update the contact details.

Click on any of the following categories, make your changes, and hit **Enter** to save each change.

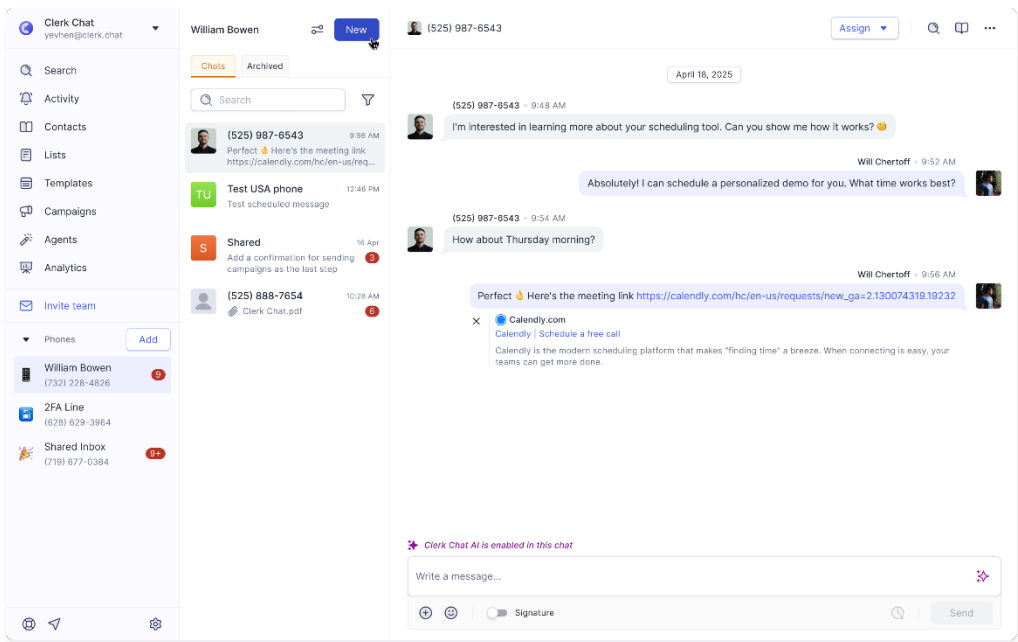
Here is what you can edit:

- **Name:** Add or update the contact's name.
- **Personal contact:** Enable if this is a private contact for you.
- **Compliance:** Enable the **Opt-Out** option for compliance purposes if the contact requested it.
- **About:** Update details like phone number, email, company name, or select new properties to tailor the contact information to your needs.
- **Lists:** If available, click here to manage any lists this contact is in or should be added to.

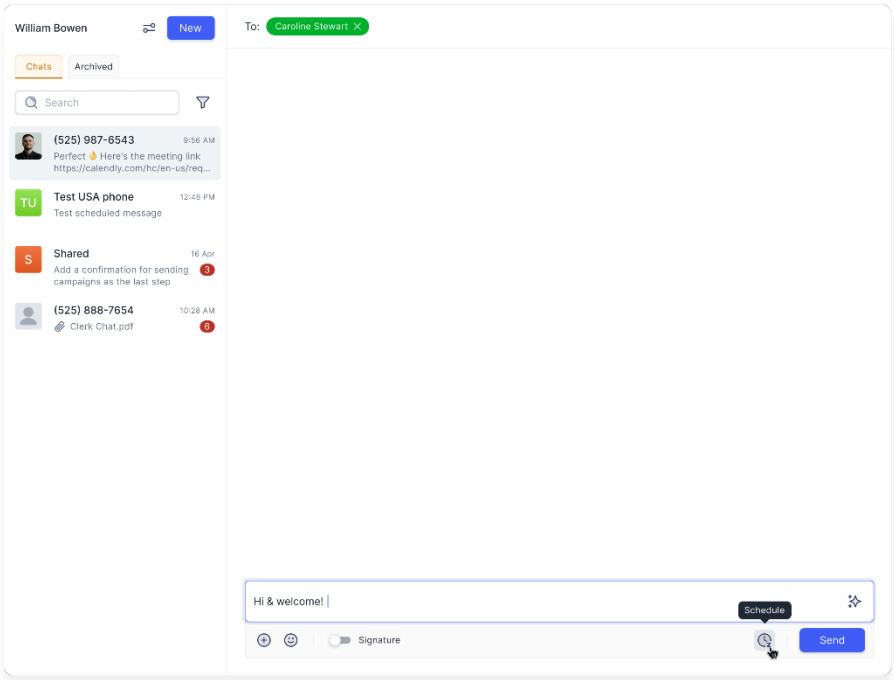


To Schedule a Message

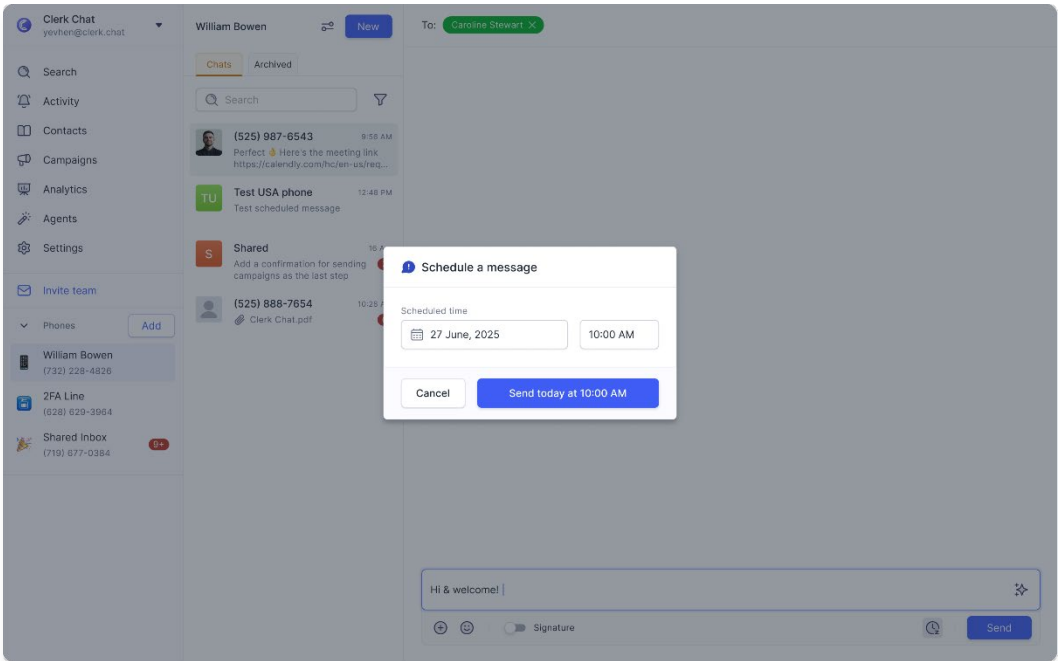
1. Click the **New** button at the top of your inbox and add the contact you want to send a message to.



- 2. Type the message you want to send.



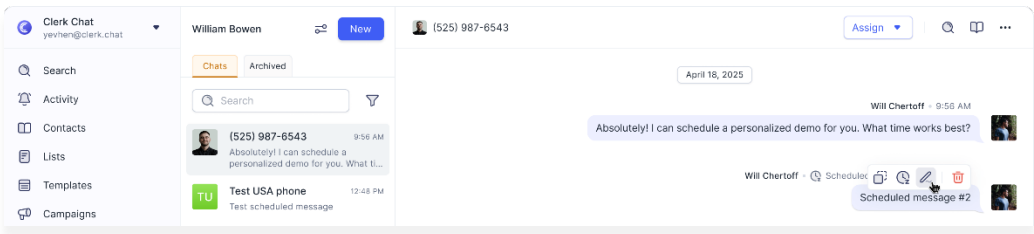
- 3. Click on the **Schedule** (clock) icon before hitting Enter or sending the message to view the setup options.



- 4. Define the date and time using the fields and tools in the dialog.
- 5. Click the blue **Send** [setup you defined] button when ready. Or Click cancel to quit and exit.

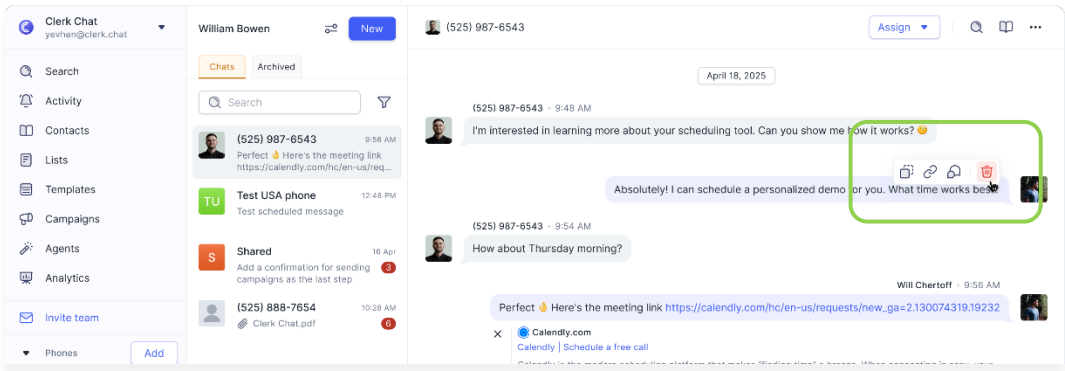
To Edit a Scheduled Message

- 1. Hover over the scheduled message to view the edit options:
 - Copy Message:** Click to copy the contents of the selected message.
 - Change Delivery Date.** Click on the clock icon to update the date and time or send now.
 - Edit.** Click the pencil icon to revise the message and click Save.
 - Delete Message:** Click



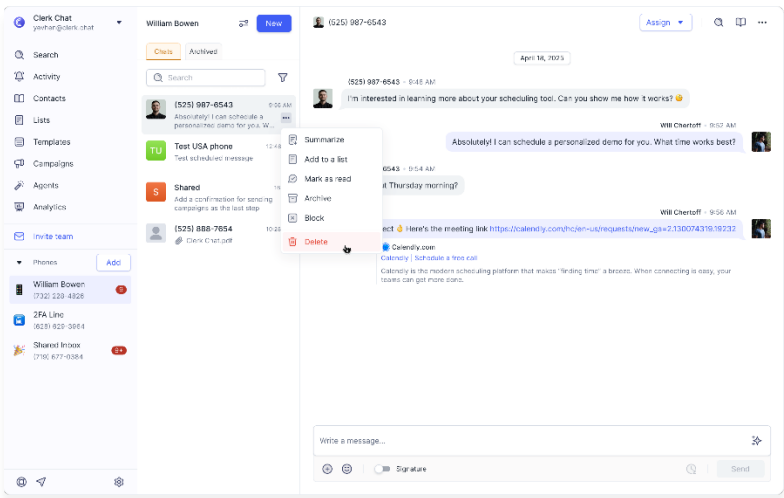
To Delete an SMS Message

- 1. Choose the desired conversation from the Conversation Panel located on the right side of the page. The entire conversation will be displayed.
- 2. Hover your mouse over the message to reveal a row of icons, which includes a **Trash Can icon**.
- 3. Click on the **Trash Can icon**, and a confirmation box will pop up, asking if you truly want to delete the message. Please note, this only deletes the message from your view. It does not delete the message on the contact's side.



To Delete an Entire SMS Conversation

- 1. Choose the desired conversation from the Conversation Panel located on the right side of the page.
- 2. Click on the **ellipsis** icon (three dots) next to the name, or on the upper right corner
- 3. Click on Delete.



The selected conversation is deleted from your view.

