SMS
FROM
EXCEL

User Guide

Contents

Requirements:

- **Windows**
- **Excel 2016+**
- **Internet connection**
- **Account with Twilio or Nexmo (we can do custom SMS providers)**
- **Enough credits to send SMS**
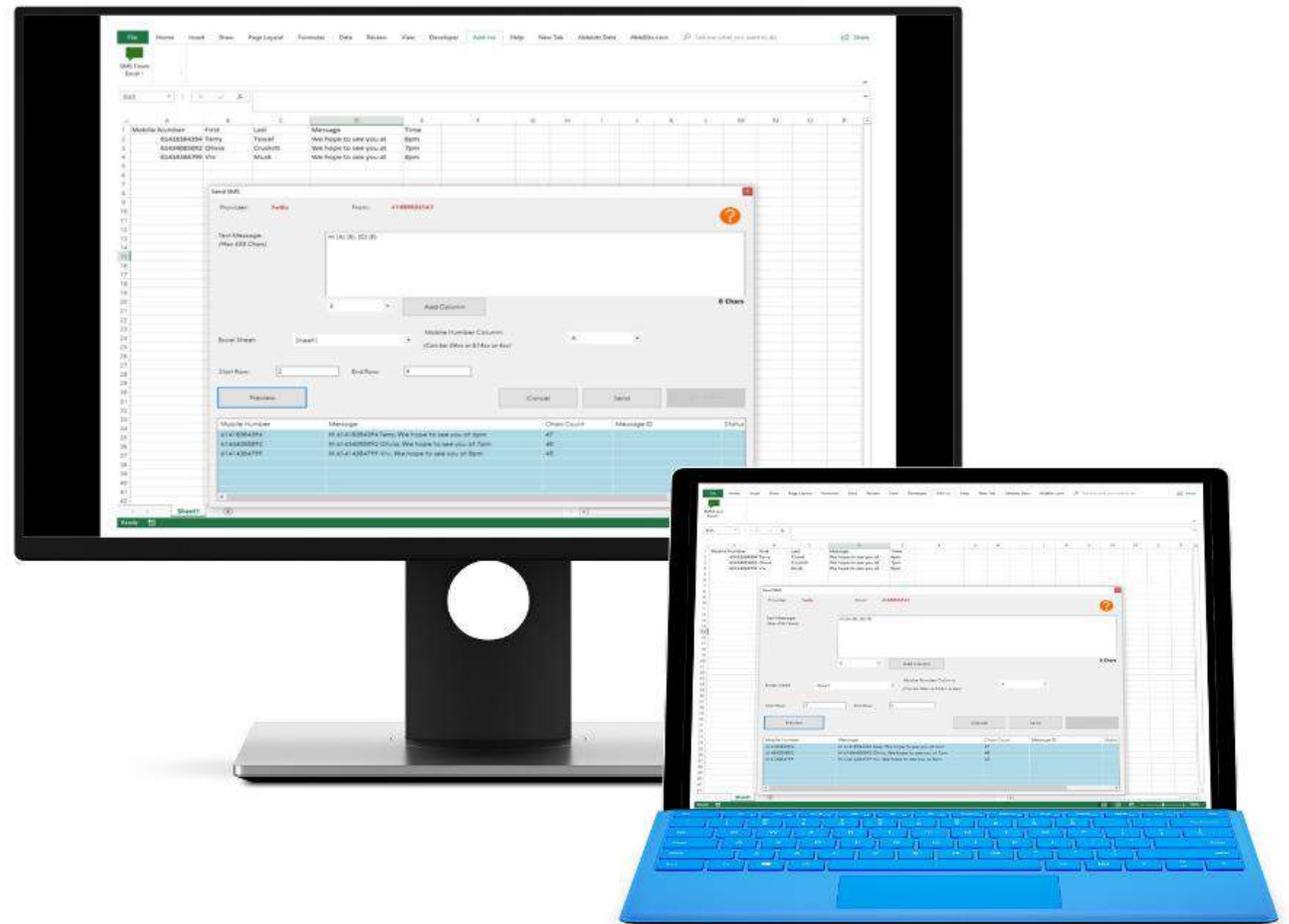
Note this is Windows software and cannot run on a Mac.

Our SMS From Excel add-in allows you to send text messages directly from Excel using your Twilio or Nexmo account credentials and credits.

You login via the software **inside** your Excel spreadsheet, instead of logging in to a platform via a browser.

Installation

Name		Type	Size	Date modi...
📇 SMSExpressSetup	Click click	Windows Installer Package	727 KB	15/08/201...

1 The software installer package is self-contained. After downloading the setup file, simply double click to RUN the installer.

If you get a warning from Windows, it is safe to run this software.
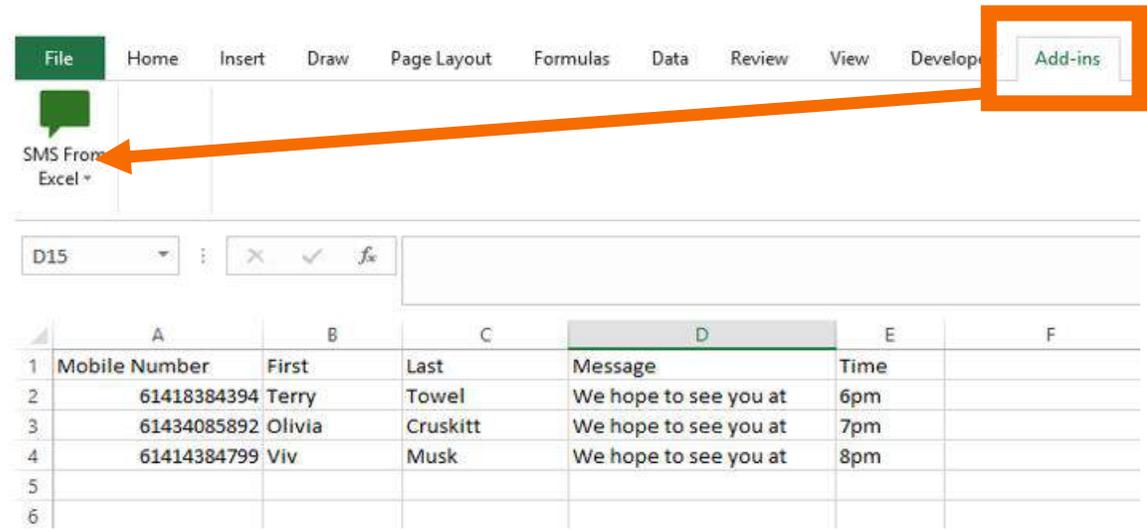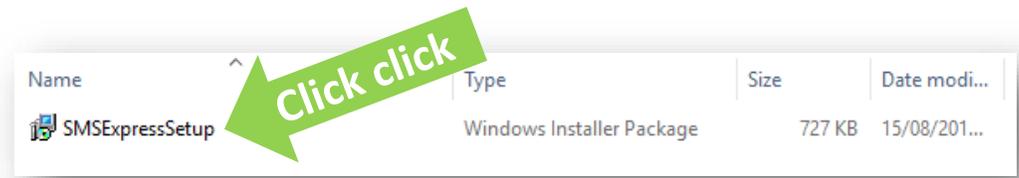Click **More Info** then **Run Anyway** button. This will allow Windows to install the add-in

Windows protected your PC

Windows Defender SmartScreen prevented an unrecognized app from starting. Running this app might put your PC at risk.

More info

Don't run

Windows protected your PC

Windows Defender SmartScreen prevented an unrecognized app from starting. Running this app might put your PC at risk.

App: SMSFromExcelSetup.msi
Publisher: Unknown publisher

Run anyway   Don't run

2 After the add-in has run, **open** an Excel document (a blank one is fine) and look for Add-ins.

3 Click the logo button, then **login** with your Twilio or Nexmo Username & Password.

*If the logo is not there, you may have to add in manually. See Troubleshooting (page 9)*

💡 **TIP: Right click the logo and *Add To Quick Access Toolbar***

File	Home	Insert	Draw	Page Layout	Formulas	Data	Review	View	Develop	Add-ins

SMS From Excel ▾

D15		:	×	✓	fx		

	A	B	C	D	E	F
1	Mobile Number	First	Last	Message	Time	
2	61418384394	Terry	Towel	We hope to see you at	6pm	
3	61434085892	Olivia	Cruskitt	We hope to see you at	7pm	
4	61414384799	Viv	Musk	We hope to see you at	8pm	
5						
6						

Settings

SMS FROM EXCEL

Before you start sending SMS, you need to enter your SMS provider's details in the Settings.

You will find these details in the **DASHBOARD** of your **Twilio** or **Nexmo** account.
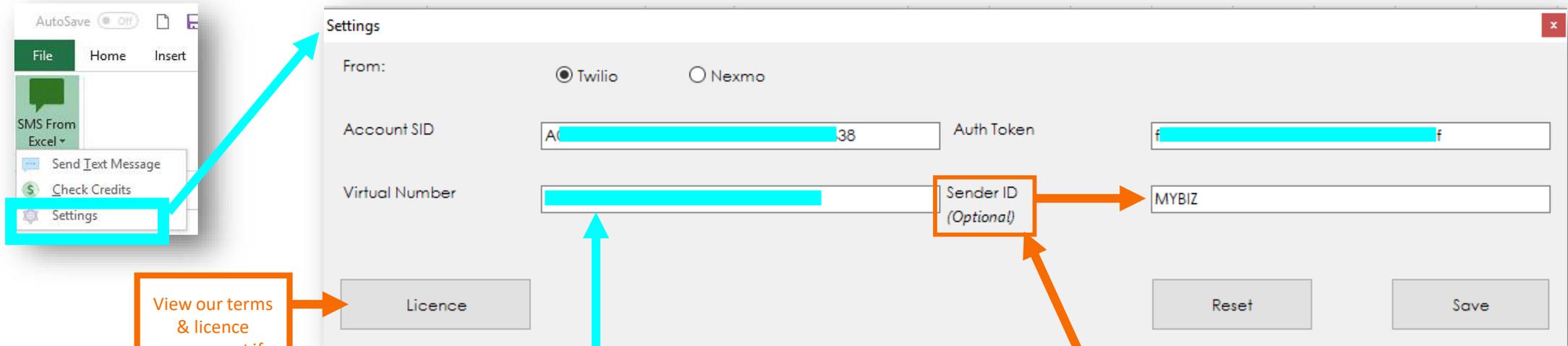
View our terms & licence agreement if you wish.

Enter the virtual mobile number from your provider.
Your SMS' will come **FROM** this number and show on receiver's phone.
You'll need one of these to get replies.
Check that the provider services your country first.

Note that some countries like India and Indonesia may block SMS from international SMS providers.

The **Sender ID** can be your business name (maximum 11 characters) or perhaps your mobile number.

If you leave **blank**, the SMS will be from one of your providers' virtual numbers. This is the **Repliable** setting.

Your provider should have info on how to handle replies.

Note if you use a **word Sender ID,** like your business name, you **cannot** get replies.

If you use your **own mobile number** replies should come **back to your phone**.

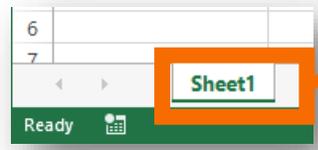**Note that some countries will block word Sender IDs. Check with your provider.**

You can **check** your Nexmo **credits** balance from the add-in.
At this time, the credits check does not work for Twilio.
If you need more credits, simply top-up via your provider.

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Functions

SMS FROM EXCEL

AutoSave ● Off

File | Home | Insert

SMS From

Send Text Message

Check Credits

Settings
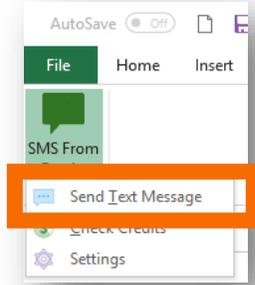
Goes to **Help Centre** on smsfromexcel.com website

Send SMS

Provider: **Twilio**   From: **MYBIZ**

Text Message:
(Max 459 Chars)

Enter your message in this box

For adding dynamic fields from your selected **Columns** for personalisation

Add Column

Character counter.

0 Chars

If you have multiple worksheets in your Excel file, select which **sheet** contains your data.

6
7

Sheet1

◄ ►

Ready

Excel Sheet: Sheet1

Mobile Number Column: A

Select the **column** in your spreadsheet which contains the mobile numbers.

Start Row: End Row:

Preview   Cancel   Send   Get Status

Mobile Number | Message | Chars Count | Message ID | Status

Preview messages before sending. If you change the message, simply click **Preview** again to **refresh**

Select which **rows** you want the SMS sent to. Our example is **Row 2** to **Row 4.**

Click **Get Status** for instant **Delivery** report which appears in the **Status** fields

Your provider should also have delivery reports.

	A	B	C	D	E
1	Mobile Number	First	Last	Message	Time
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4	61414384799	Viv	Musky	We hope to see you at	8pm
5					
6					
7					

◄ ►   **Sheet1**   ⊕

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Simple SMS

If you want to blast out a quick SMS:

1. **Type in your message**
2. **Select your Rows**
3. **Preview**
4. **Send.**

Done.

Our examples are using Australian country code **61**. But obviously you would use the appropriate country codes and/or prefixes for your destination country.

If you are sending within your own country, you should **not** need to add a country code **nor** + .

Example, if we were sending within Australia we'd only need to use 04 or just 4 as the prefix.

But check with your provider. We can also help you test.

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For a fancier SMS, see the next page…

Personalised SMS

You can use the **Add Column** or type the **Columns** in manually using your keyboard.

Make sure you use curly the brackets **{} .**

For example, if I wanted to include the Last name I could type in: **Hi {B} {C}, {D} {E}**

This would read**:**
Hi Terry Towel, We hope to see you at 6pm
Hi Olivia Cruskitt, We hope to see you at 7pm
Hi Viv Musky, We hope to see you at 8pm

SMS FROM EXCEL

The Windows installer containing the add-in software usually whirs away and installs itself into your PC's C: drive and into the Program Files(x86) folder. Then adds it into Excel for you. But some systems can be fusspots (especially on some servers).

Here's how to manually add the **add-in** to your Excel spreadsheet:

TIP: If you still have issues, please consult your IT person as your server may have special permissions running, which we cannot assist with.

Note this is Windows software and cannot run on a Mac.

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