Campaign Sequence - Text message %

This article applies to:

Max Classic

Use Keap's text messaging automation in the Campaign Builder to send critical communication through text messages via a toll-free 1-800 number. Text messages have an open rate of 94%, much higher than email's ~21% open rate. This feature will initially only be available to U.S.-based customers and will include an additional permessage cost after it's full release.

For more information about Keap's text message automation, refer to our text message broadcast and automation FAQs.

- 1. Send an automated text message
- 2. Opt-in messages and requirements
- 3. Preview Keap's opt-in message
- 4. Give feedback to Keap

Send an automated text message

1. Navigate to Marketing > Campaign Builder

My Nav	CRM	Marketing	E-Commerce	Admin
Basic Training	Contacts	Campaign Builder	E-Commerce Setup	Branding Center
Initial Setup	Companies	Email & Broadcasts	Orders	Billing & Account Info
Dashboard	Opportunities	Lead Generation	Products	Users
My Day	Referral Partners	Templates	Payment Setup	Import Data
	Visitors	Dynamic Content	Actions	Data Cleanup
	Zapier Integrations	Legacy	Promotions	Analytics
			Legacy	

- 2. Create a new campaign or open an existing one
- 3. Name your automation

		Please Name Your Campaign ×	Ì		
•		Marketing text message			
		Select a category to add			
		Cancel			

4. Add and connect a goal and sequence to your automation

Note: For more information on how to create automation, refer to our help articles

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			· 1	Form s	ubmit	ted		- Ur	ntitled	Sequ	ence			
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5. Double-click the sequence to open it

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6. Drag the Text message object onto the canvas

Communicati	ons		Ŀ								
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Email message	Fax	Letter	Ŀ	•	•	•	•	•	•	•	•
E											
Text message			Ľ.	•		•	•			•	

7. Double-click the Text message object to configure it



8. Write your message

(855) 916-5373	Ø
To PHONE 1	
Hey [[contact.first_name]], know about my new offers	wanted you to be the first to

9. Be sure to check the "Do you have permission to Text?" box

Do you have permission to text? *
I certify and confirm all contacts added to this automation have provided prior express opt-in consent compliant with all laws to receive marketing texts from my company, and that I will maintain those records as required by applicable laws.
Missing something? Let us know. Give feedback

10. Click Done

		٢	Send test	Done
Preview	Show opt-in message			

11. Switch your sequence to Ready

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12. Finish creating your automation and publish it

Please note: If you get an error message when you open your Text campaign process, be sure to check if your application has your **Company Name** saved. *Texting will not work without it!*

titled Sequence	0	
Write your text message	We couldn't load your Keap Marketing Number This is likely the result of a system error. Please try again in a few moments. Ok, got it	eviev
Audience		
Send to these phone types*	~	
Phone types are managed on the contact record		

- To check your **Company Name** navigate to:
 - Admin Tab>Settings>
 - Application Settings>General>Company info>Company Name> update your Company Name and Save

Branding Center	Import Data	Data Cleanup	Stealth 🗸	Settings	
All Applica	ation S	ettings			
Application Settings		Custom Fields			
General		Set i	up custom field	s for: Contact	✓ Go
Application	_	Company Info			
Main Nav			Com	pany	

Opt-in messages and requirements

Keap's text messaging automation automatically handles **most** opt-in requirements, including double opt-in. The first time you send a text to a phone number, Keap will ask the contact if they want to receive messages from your business.

While Keap confirms the contact is opting in to texts, you are responsible for understanding and complying with the laws and regulations associated with consent for text message automation and marketing.

Benefits of receiving consent for text messages:

- You only send messages to the contacts that want to receive them
- Keap tracks opt-in and opt-out status on a per phone number basis, making it easy for the you to know who is opted in or out even if you have multiple contacts with the same phone number

FAQs

Does the opt-in message get sent to everyone?

Opt-in messages only get sent to contacts that have not previously opted in. If we have no history of opt-in then a contact will receive an opt-in message.

I have previously received consent from my contacts using another system, can I skip the opt-in?

To help users stay compliant with the law, we require consent through our tools even if you've previously received consent on another tool.

Can I customize my opt-in message?

Not at this time, however we plan to allow users to customize their opt-in message in the future.

Is there a way to opt-in on a form?

Not at this time, however we plan to allow users to get single opt-in consent when a contact submits their info through a form.

Preview Keap's opt-in message

When drafting an automated text message, you can preview the opt-in message to see what your contacts will receive.

1. Click on Show opt-in message



2. The double opt-in process includes asking contacts if they want to receive a message asking the contact to opt-in

Preview	
Hide opt-in messag	ge
Don't miss out on the latest from Keap Help Center.	; >
Reply YES for text updates.	
Reply STOP to unsubscribe anytime. MSG and data rates n apply.	nay
(855) 916-5373 9:36 am	
	Yes
	9:37 am
	•
l	7

3. Once the contact opts in, a confirmation message for opt-in is sent and the message is sent



Give feedback to Keap

While our text message automation feature is in development and testing, you have the ability to share feedback directly to our engineering team. To submit your feedback, follow these steps:

- 1. Navigate to your automated text message within an automation process
- 2. Click Give feedback

