



MyCloud Messenger

Product Manual

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Introduction

MyCloud Messenger is a text messaging platform that automates, streamlines, and personalizes text communication between your business and your customers. This guide will walk you through the simple steps to get your new MyCloud Messenger account up and running. Self-help is built into the platform for quick tips on how to easily administer and perform common actions. For a more detailed guide, please reference the full product manual.

Features

- **Campaign** - Send targeted text and email messages to different audiences based on their unique criteria
- **Timetext**
 - Scheduled - Schedule texts to an individual or a group of recipients
 - Reminders - Automate text reminders for customers relating to a predetermined date/time
 - Interval - Leverage drip campaigns to communicate messaging over a period of time
- **Inbound Text Routing** - Intelligently route inbound text communication to automated responses or queues for 1/1 interaction
- **Keywords** - Trigger an action or set of actions when a contact texts in specific word
- **Live Agent Interaction** - Have 1/1 conversations with customers to increase customer engagement and satisfaction
- **Open API** - Text-enable software applications to enhance your current workflows and simplify customer communication
- **Web Chat** - Allow customers to connect with you through your website

Logging In

To login, simply navigate to your company's custom URL or go to <https://portal.mycloudmessenger.com/login> in your favorite browser and enter the account credentials provided to you.

If you have forgotten your password, click the forgotten password link below the login button. Then, enter the email address associated with your user account and follow the reset instructions contained in the system-generated email.



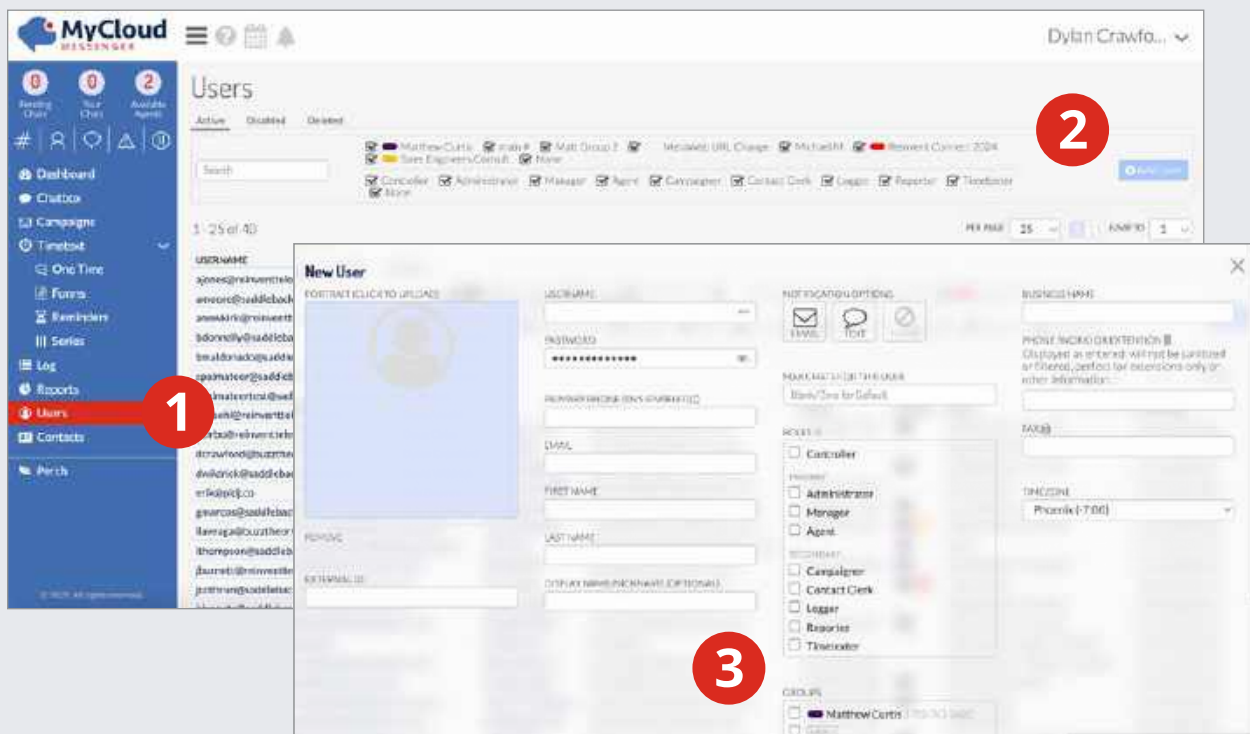
The screenshot shows the MyCloud Messenger login interface. At the top is the MyCloud Messenger logo. Below it are four input fields: 'WORKSPACE' with a placeholder 'Your Workspace', 'USERNAME/EMAIL' with a placeholder 'Your Username', and 'PASSWORD' with a masked password '*****' and an eye icon. A dark blue 'Login' button with a lock icon is positioned below the password field. At the bottom, there is a link that says 'Forgot your username or password?'.

Adding Users

One of the first things you may want to do is add users to your account. Because MyCloud Messenger charges you only for what you use, build as many users as you need.

To create a user:

1. Click Users in the left-hand menu
 2. Select Add User in the upper right corner of the user screen
 3. Add the user information, assign roles, give group access, and select Save
- *For a description of available roles, click the (?) next to Roles.



Note: you can easily edit your active users to make changes on the fly, send a password reset email, or even temporarily disable or delete them completely.

Adding Contacts

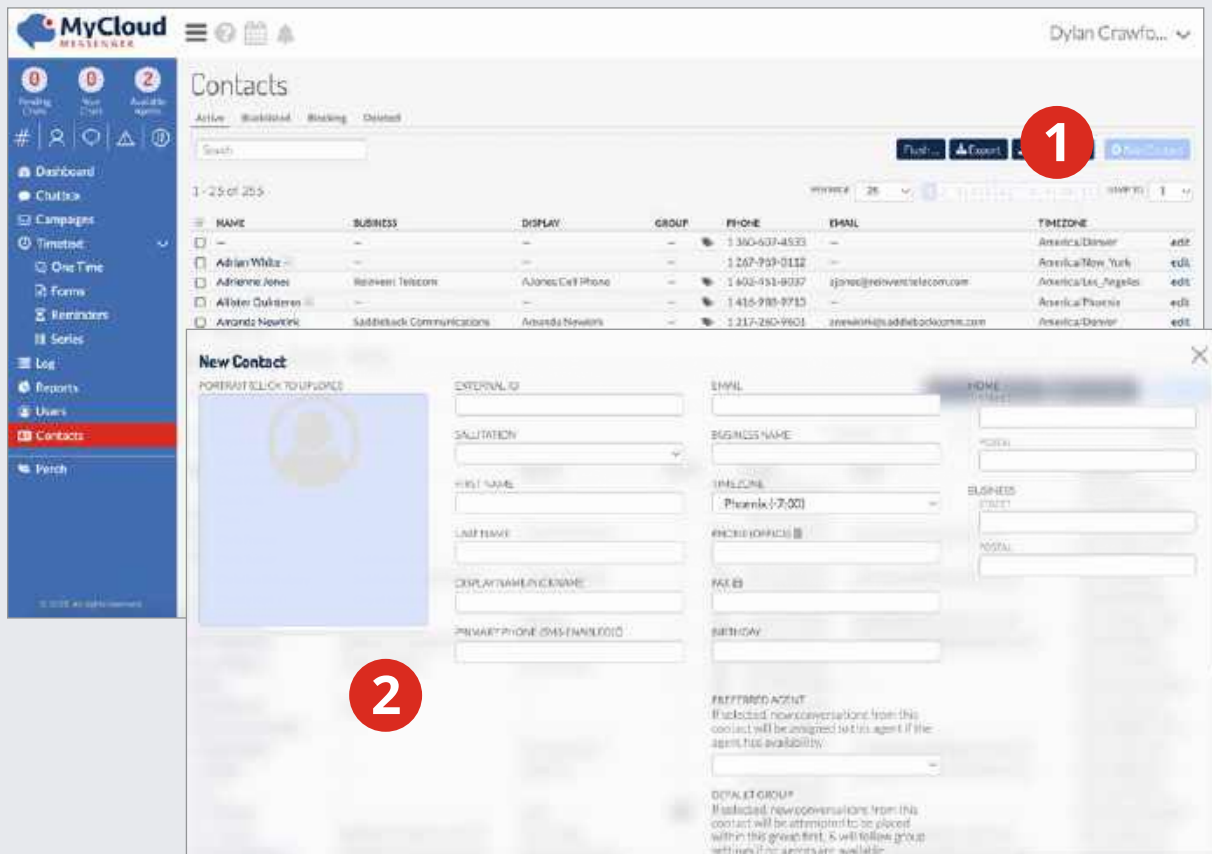
Since your engagement is built around your contacts themselves, knowing how to add and segment contacts is key. Contacts can be found in the left-hand menu.

Adding a single contact

To add a contact:

1. Click the Add Contact button
2. Enter the contact details such as name, phone number, and email address
*Primary phone number is required. Adding tags to a contact will allow you to send targeted messages

For example, you may want to send a promotion to all of your gym customers that have the gold membership. For this, you might choose to add both a 'gold' and 'member' tag. This will allow you to send messages to all members when needed, as well as to only those with a gold membership.



Bulk importing contacts

To mass import your contacts:

1. Export them from their current location and save the file as a .csv
 2. From the Contacts screen, select Bulk Import
 3. Choose the .csv file you have saved
 4. Map the field names in your list to the field names in MyCloud Messenger
 5. Choose the tag(s) you would like to apply to the imported contacts
 6. Check the box to confirm contacts have agreed to messaging and click Import
- *You can alternatively import tags by adding a tags column. Multiple tags should be separated by a pipe bar "|" typically located above the Enter key. Additionally, you can perform wireless number validation on any import by checking the LRN lookup box.

Contact Bulk Import

You can upload a CSV of your contacts for a quick start. Use the template provided to organize & gather your data.

We will attempt to find existing contacts by phone number or email address, but please be aware that doing an import more than once can easily produce duplicates.

***To import tags:** Enter any number of tags in a single column, separate multiple tags with the "bar" or "pipe" character (|). To remove tags from an existing contact (delete): Enter any number of tags in a single column, separated as the Tags, then select "Unflag" for that column.

Import Steps: Queued Processing Waiting Tagging Unflagging Completed

NOTE: This feature expects to be served a UTF-8 encoded CSV. Other formats may process, but will likely have errors.

SUPPORTED FIELDS:

- First Name
- Last Name
- Company Name
- Display Name
- Primary Phone Number
- Email Address
- Home Street Address
- Home Postal
- Group
- Tags**
- Untag
- Any Custom Contact Field

UPLOAD CSV FILE

Choose File | Mainvent - IT N...31-23-2021.csv

12.2 MB

- Import -	First Name	Last Name	- Import/discard -	- Import -	- Import -	- Import -	- Import -	- Import -	- Import -	- Import -	- Import -	- Import -	- Import -	- Import -	- Import -
Lead Type	First Name	Last Name	Email	Company	Country	Work Street Address	Work Address 2	Work City	Work State / Province	Work Zip / Postal Code	Unattached Scanned Image Text	2. Notes	4. Is there a business need?		
Lead Capture	Noah	Grite	noahgrite@connected.io	Connected LLC	USA	201 S Capitol Ave		Indianapolis	Indiana	46225	No	answer provided	No	answer provided	
Lead Capture	Tobias	Lutz	tobias@myitcrowny.com	My IT Crowd	USA	504 Park Avenue	333	Brooklyn	New York	11205	No	answer provided	No	answer provided	
Lead Capture	Michael	Roback	mroback@singlepointglobal.com	SinglePoint Global	USA	21720 Red Run Drive, STE 122		Arbourn	Virginia	20147	Authc	No	answer provided		
Lead Capture	Jason	Hahn	jha1rv@comcast.com	Computer Solutions	USA	10420 Wurzbach Parkway Suite 175		San Antonio	Texas	78216	No	answer provided	No	answer provided	
Lead Capture	Carl	Goodfriend	carlg@provinc.com	ProVINEt Solutions	CIO	7084682000	USA	18645 West Creek Drive	Timber Park	Illinois	60477	No	answer provided	No	answer provided

Please review the information and select what columns will be imported as what data. It is of the utmost importance that you select the fields correctly. Any mismatch will create contacts with bad and misplaced data. This is especially true of the Primary Phone Number field, as this is used to identify existing records and is integral to the system. Please also be sure to indicate if your file contains a header row.

Note: if importing a subsequent list, MyCloud Messenger will scrub the file for duplicate phone numbers and emails addresses. As with any import, be mindful as duplicates can still happen.

IMPORT	STATUS	LOG
Tue, 15 Mar 2022, 3:52 pm	Completed	<div style="border: 1px solid #ccc; padding: 5px;"><p>Starting Contact Import: 2022-03-15 22:52:13 Loading 68 contacts... Processing 7 contacts... Processed 0 new contacts and 7 updated/restored contacts. Saving processed contacts... Tagging contacts... Untagging contacts... Done: 2022-03-15 22:52:13</p></div>

You can view the status and logs of every import processed within the Bulk Import screen.

Managing Contacts

Contacts can be one of four statuses: Active, Blacklisted, Blocking, and Deleted.

- **Active** - contacts you can send messages to and receive messages from
- **Blacklisted** - contacts whose inbound messages will be ignored (i.e. spammers)
- **Blocking** - contacts who have replied STOP to opt-out of your messages
- **Deleted** - contacts that are currently inactive (you can restore at any time)

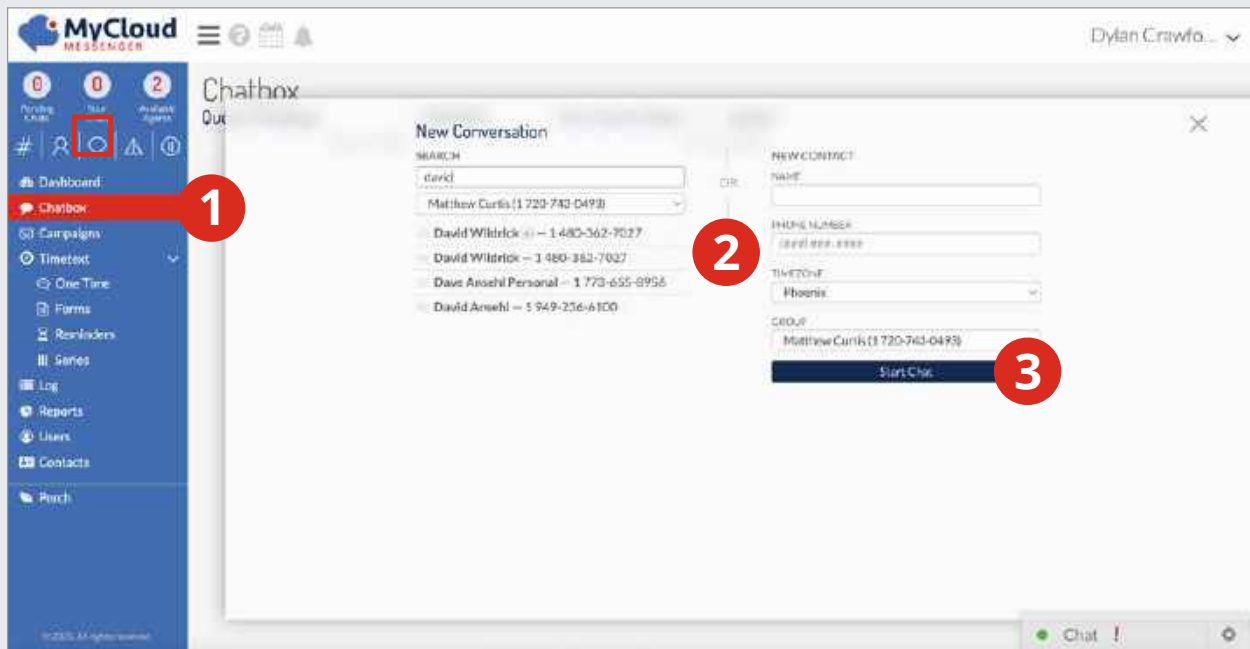
Sending Messages

As a business you may want to send a text out to every customer you have, a subset of customers, or perhaps simply begin a conversation with a single customer. MyCloud Messenger has you covered for every scenario.

Single contact

Sending a single message:

1. Select the New Message button at the top of the left-hand menu
2. Search for a contact or enter new contact information and choose the number to send from
3. Click Start Chat



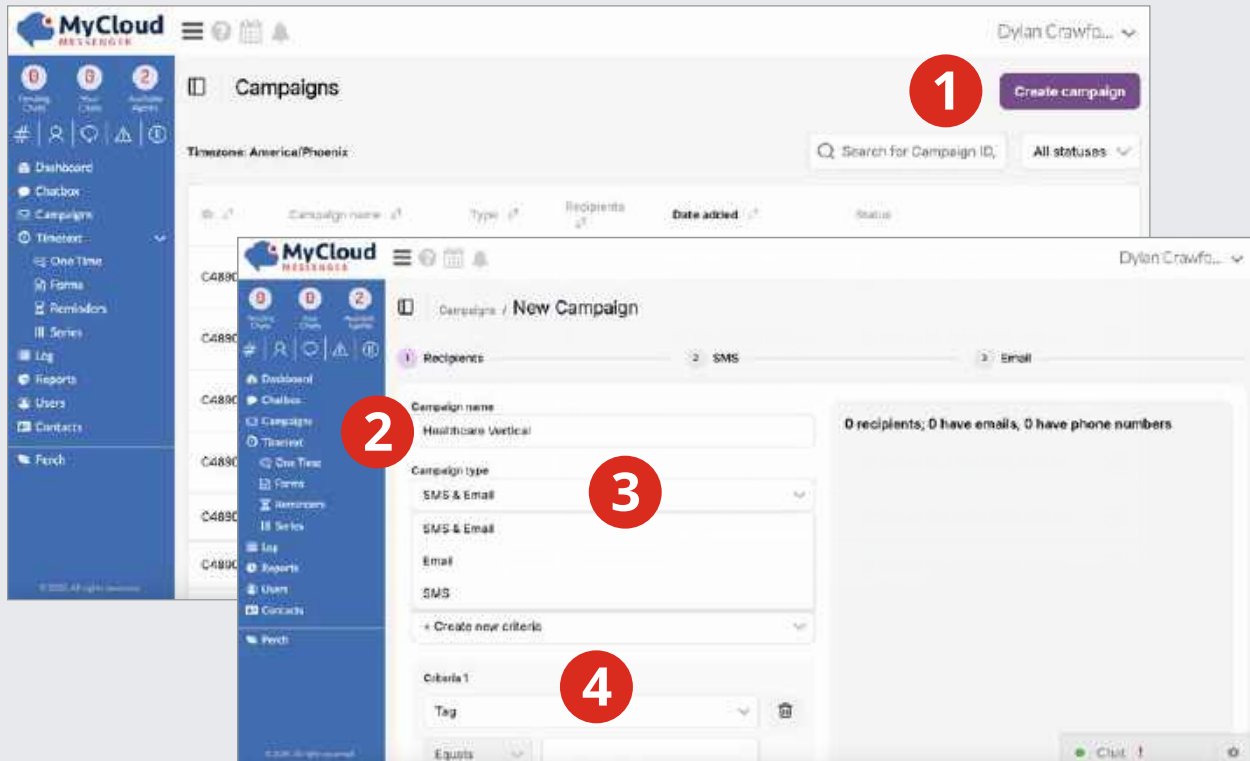
A new chat window will pop up where you can send and receive messages with your contact.

Many contacts - Campaigns

Campaigns make it easy to reach your audience by SMS, email or both — all in one workflow. To send a Campaign:

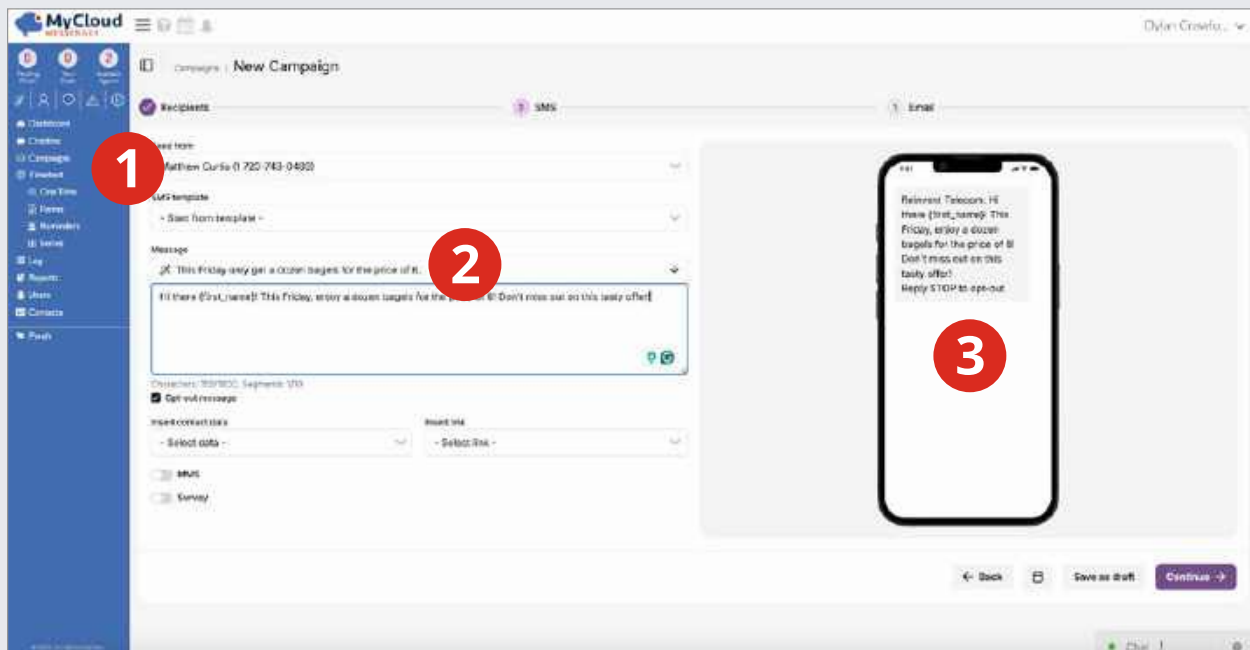
Step 1: Start a New Campaign

1. Click Create Campaign (top right)
 2. Enter a Campaign Name
 3. Select your campaign type: SMS only, Email only or SMS + Email
 4. Determine your audience criteria or simply add all contacts and click Apply criteria
- *You can easily save a criteria template for use in future campaigns



Step 2: Create Your SMS Message

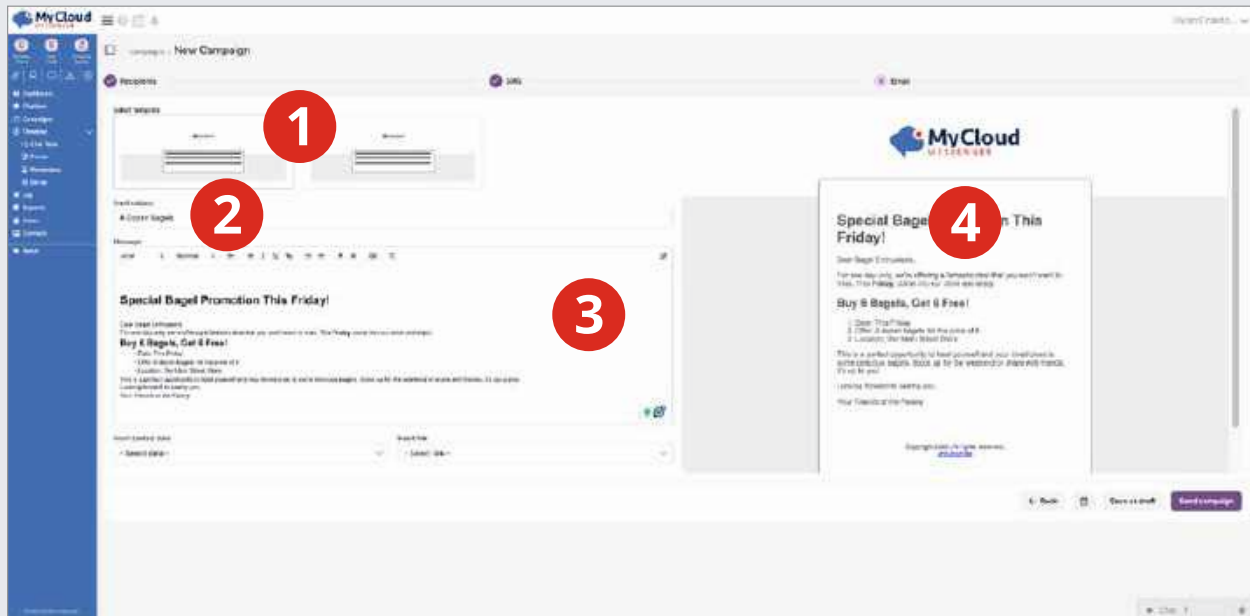
1. Choose the number you would like to send the message from
2. Write your message:
 - From a message template (see templates)
 - Using the AI Message Coach
 - Or simply type your own
3. Preview the SMS on the right



*You can personalized your message by inserting contact data, tracking links, pictures and even vCards

Step 3: Create Your Email Message

1. Choose a saved email template
2. Enter the Subject of your email
3. Add email content or use the AI coach to help get started
4. Preview your email on the right



Step 4: Review & Send

- Save as draft - return later
- Schedule campaign - set a future date/time
- Send campaign - send immediately

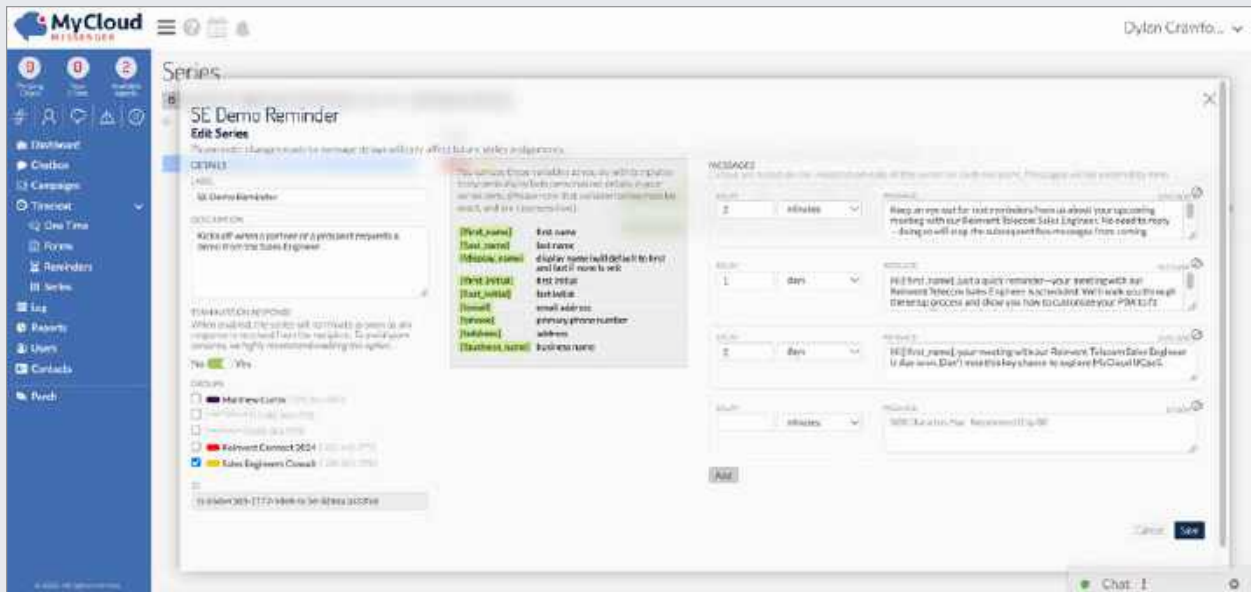
Series

Series can be used to build informational campaigns, nurture leads, or provide an enhanced onboarding experience to your employees or customers.

First, you'll want to create a series which can be found under the Admin Menu located in the upper right-hand corner and select Create Series.

Creating a new Series:

1. Give it a name
2. Provide a brief description
3. Add your messages
 - *Each message should be assigned a delay which determines when the message will be sent in relation to when a recipient was subscribed to the Series.



Note: you can also personalize each message by selecting from the variables list to inject things like the contact's first name.

Subscribing contacts:

1. Select Series under the Timetext menu in the left-hand menu
2. Search for contacts matching your desired criteria
3. Choose the series, and click Send
 - *Contacts can also be automatically subscribed through a Keyword operation.

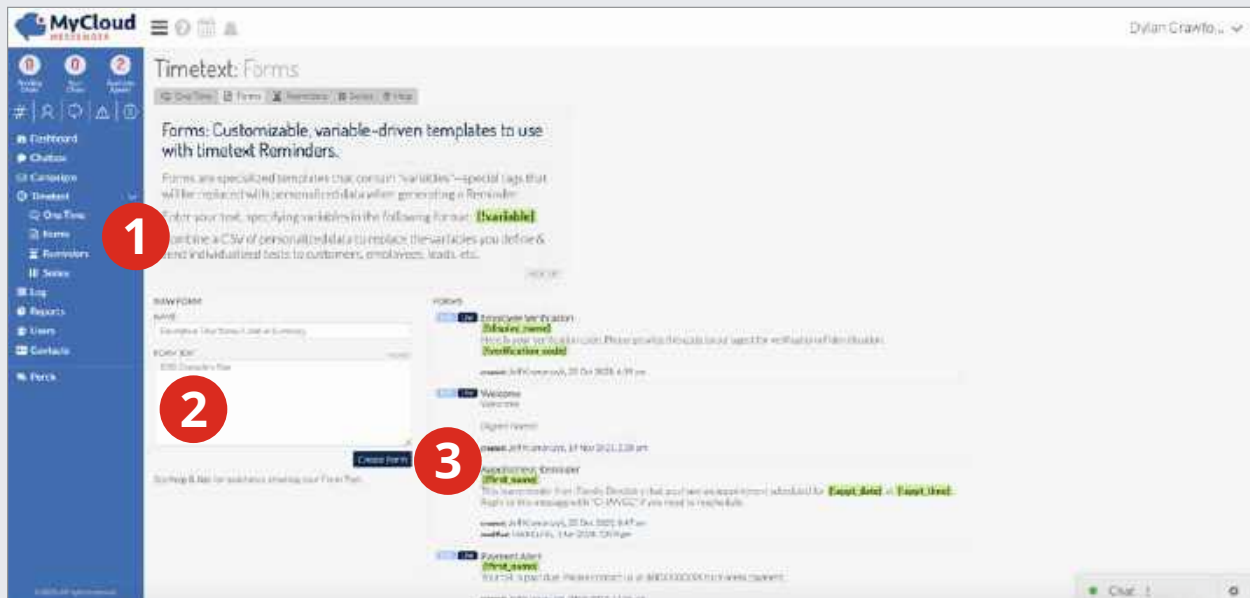
Reminders

Reminders can be used to send a text notification prior to an upcoming appointment, bill due date, or scheduled delivery date. This can help assure things like on-time payments and accurate appointment schedules.

To schedule automated reminders you must first create a form. Think of a form as the body of the reminder, where you can add placeholders for variables like date, time, location, and more.

To create a new form:

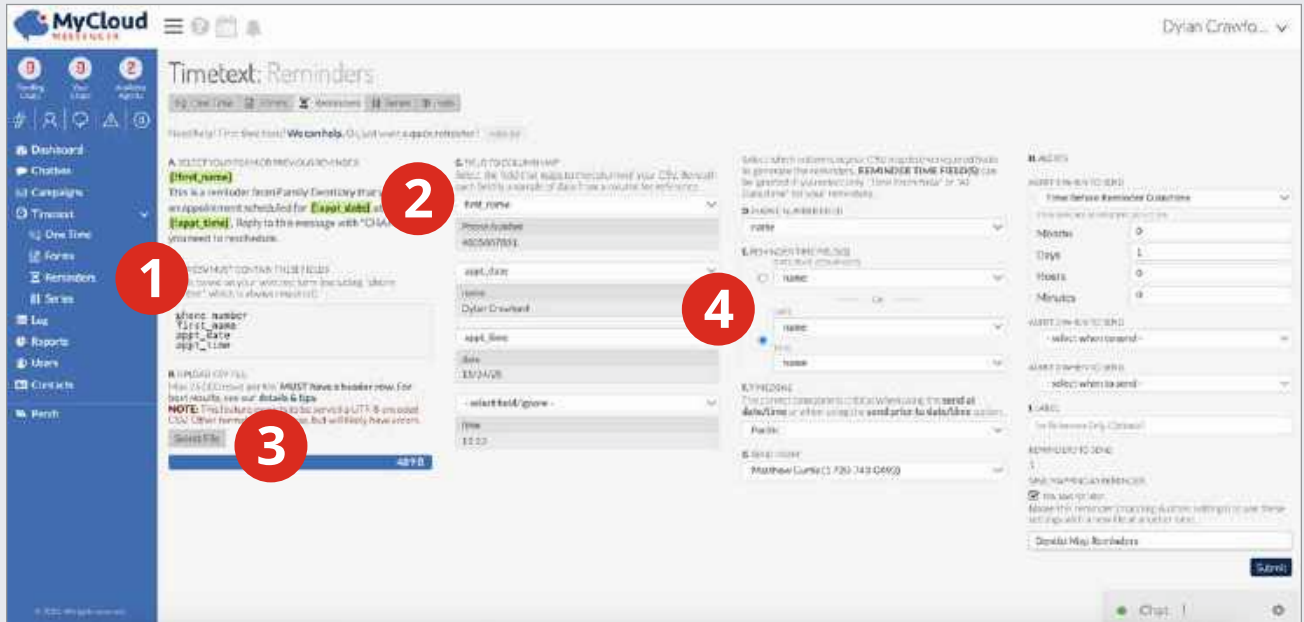
1. Select Forms under Timetext in the left-hand menu
2. Give the form a name and craft its messaging
3. Click Create Form



Note: almost any variable field can be added by inserting `{!field_name}` into the message. These variables must exist in the file used for import in the next step.

To schedule your reminders:

1. Select Reminders
2. Choose the form
3. Upload the .csv file containing the reminder information
4. Map the fields and choose when to schedule each message
5. Click Submit



Groups and Pathways

In MyCloud Messenger, groups allow you to queue inbound messages that are handled by a specific team. Pathways enable you to route inbound text messages to those groups for live agent interaction or simply send automated responses.

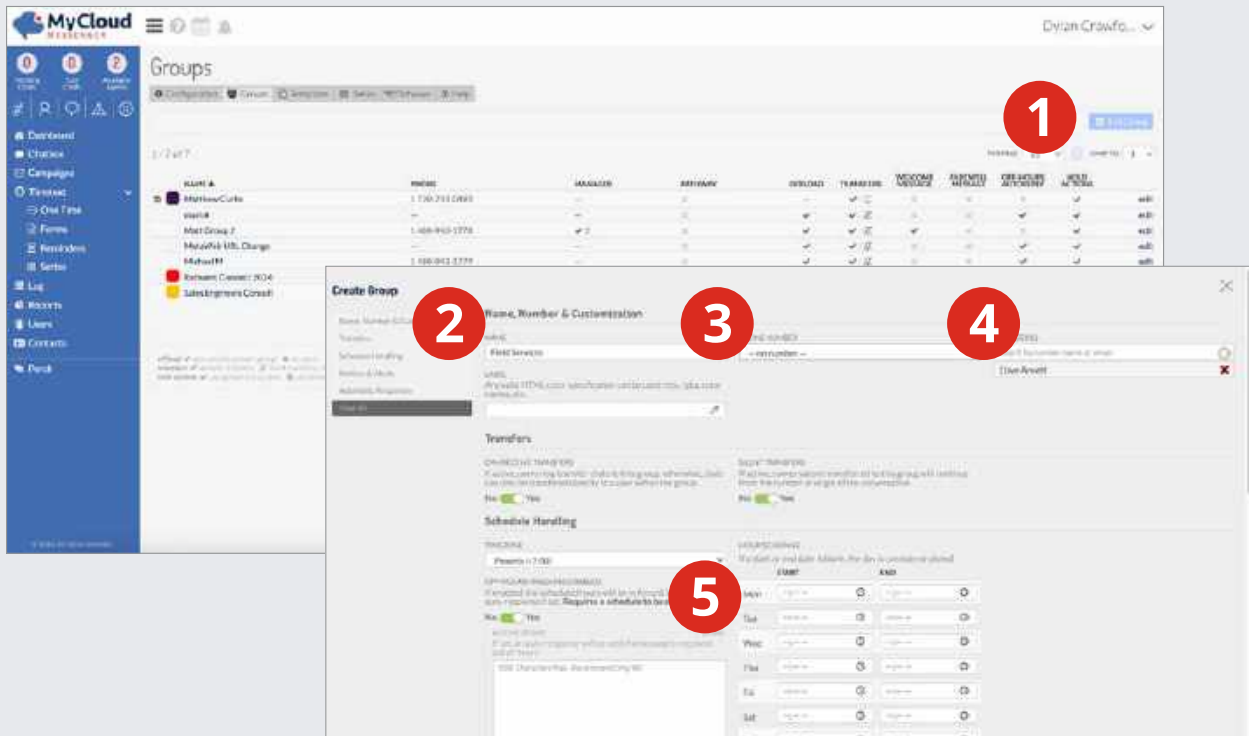
Groups

Your MyCloud Messenger account has a single, pre-built primary group. This allows you to send and receive messages from day one. You can add groups based on things like department, topic, or campaign.

First navigate to Groups under the Admin Menu in the upper right-hand menu.

To add a group:

1. Click Add Group
2. Give the new group a name
3. Assign a new number (optional)
4. Add a manager (optional)
5. Configure group settings and click Save



Note: you will need to add the group(s) to the users desired by editing each user and selecting the correct group(s).

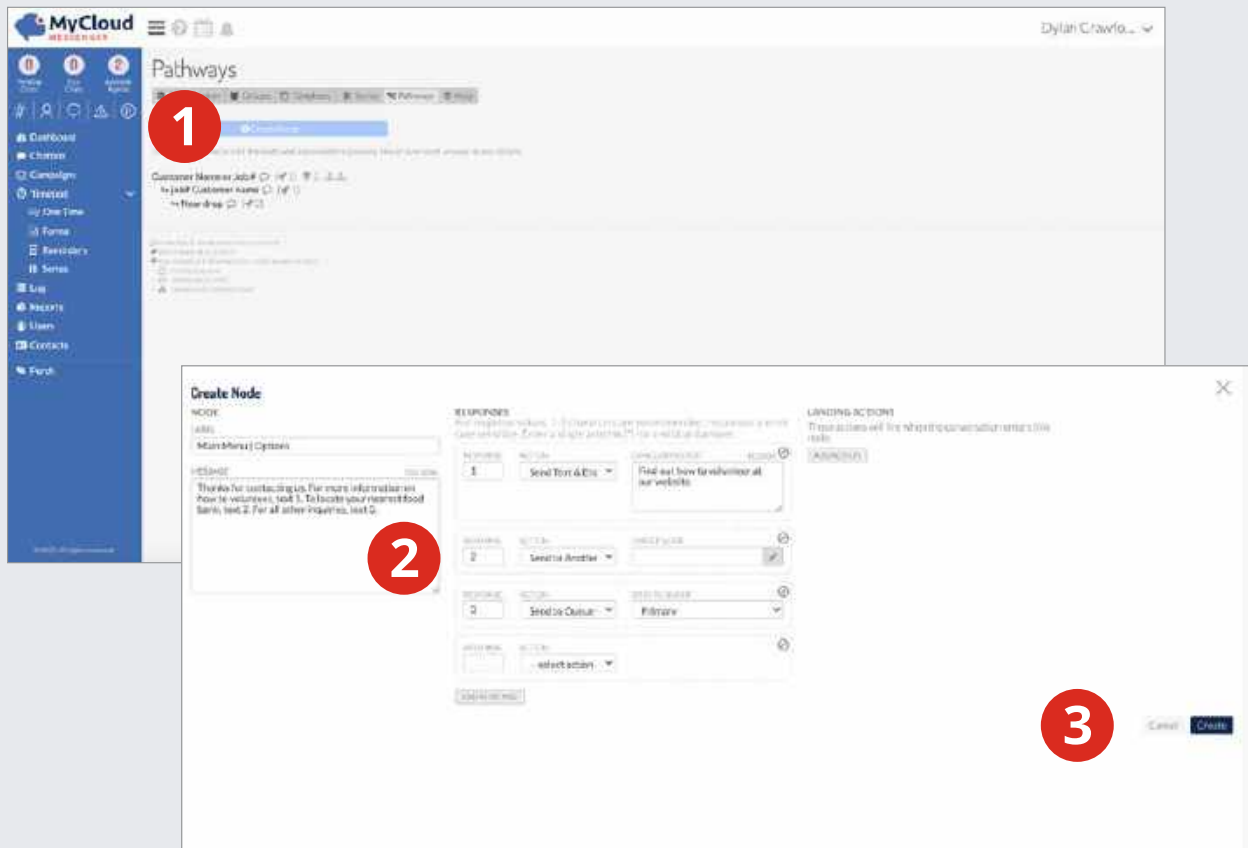
Pathways

Pathways within MyCloud Messenger allow you to automate inbound text interactions. This allows you to effectively provide information, queue chats up for a live agent, or simply terminate the interaction with a message.

You will build your pathway by creating nodes. Each pathway must contain at least one. First, choose Pathways from the Admin Menu in the upper right-hand corner.

To add a node:

1. Click Create Node
2. Enter a name, automated message, and add the acceptable responses/actions for each
3. Click Save



Note: If creating multiple nodes, it is best to work backwards, creating your final node first. Assigning the new pathway within a group's settings will determine when a contact will interact with it.

Keywords

Your MyCloud Messenger account allows you to create an unlimited number of keywords; each configured to perform an action or set of actions when texted. Keyword management can be found under the Admin menu in the upper right-hand corner.

Building Operations

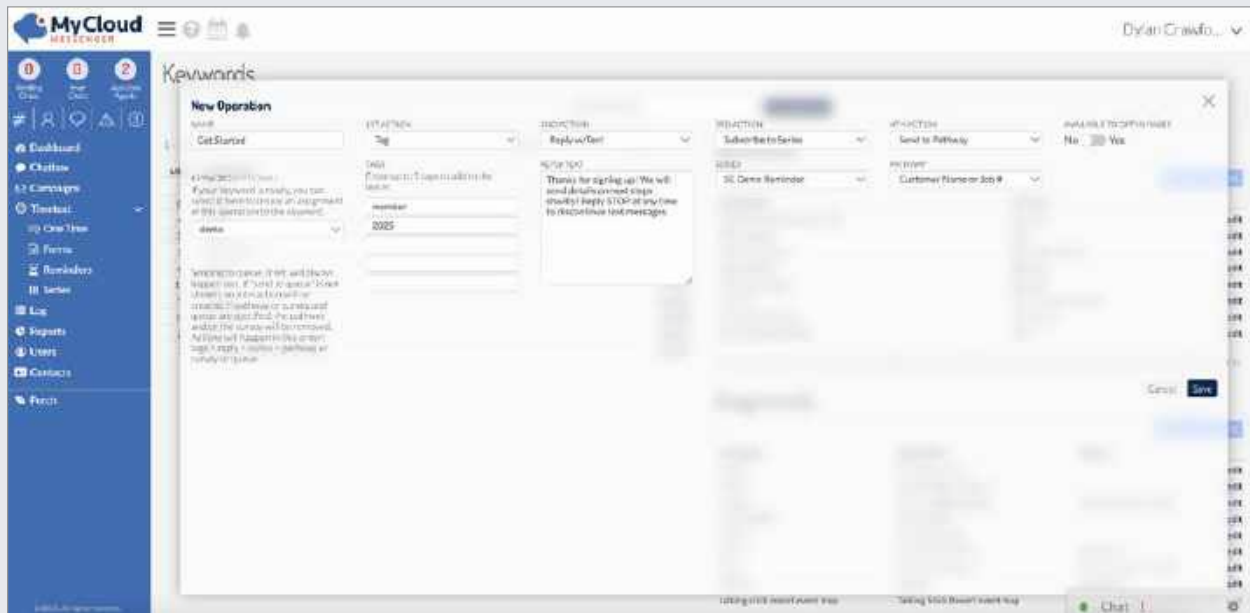
First, you will want to build an operation which is an action or multiple actions set to happen when a keyword is texted. These actions can be:

- **Tag** - this will tag a contact with up to 5 preset tags automatically
- **Untag** - this will remove a tag or set of tags
- **Reply w/text** - sets an auto-reply text to be sent
- **Send to queue** - sends the contact into a specific queue to chat with an agent
- **Subscribe to series** - subscribes a contact to a specified drip campaign
- **Send to pathway** - routes a contact to an automated pathway to provide automated information or drop into a queue to chat with an agent
- **Initiate survey** - this launches a preset survey with the contact
- **Send contact edit link** - sends a web-link for a page that allows contacts to add/update their information
- **Send virtual contact file** - sends a contact file that recipients can easily store in their phone contacts

To add a new Operation:

1. Click Add Operation from the Keyword management screen in the Admin Menu
2. Give the operation a name
3. Assign it to a Keyword if one already exists
4. Configure the actions you would like to take place

Below is a simple example, where a keyword is sent in, the contact is tagged, sent a response, and subscribed to an informational Series.



Note: 'send to queue', 'send to pathway', and 'initiate survey' actions cannot be combined in the same operation.

If you have already established a keyword, you can easily select it directly from the operation. When you're all set, click Save.

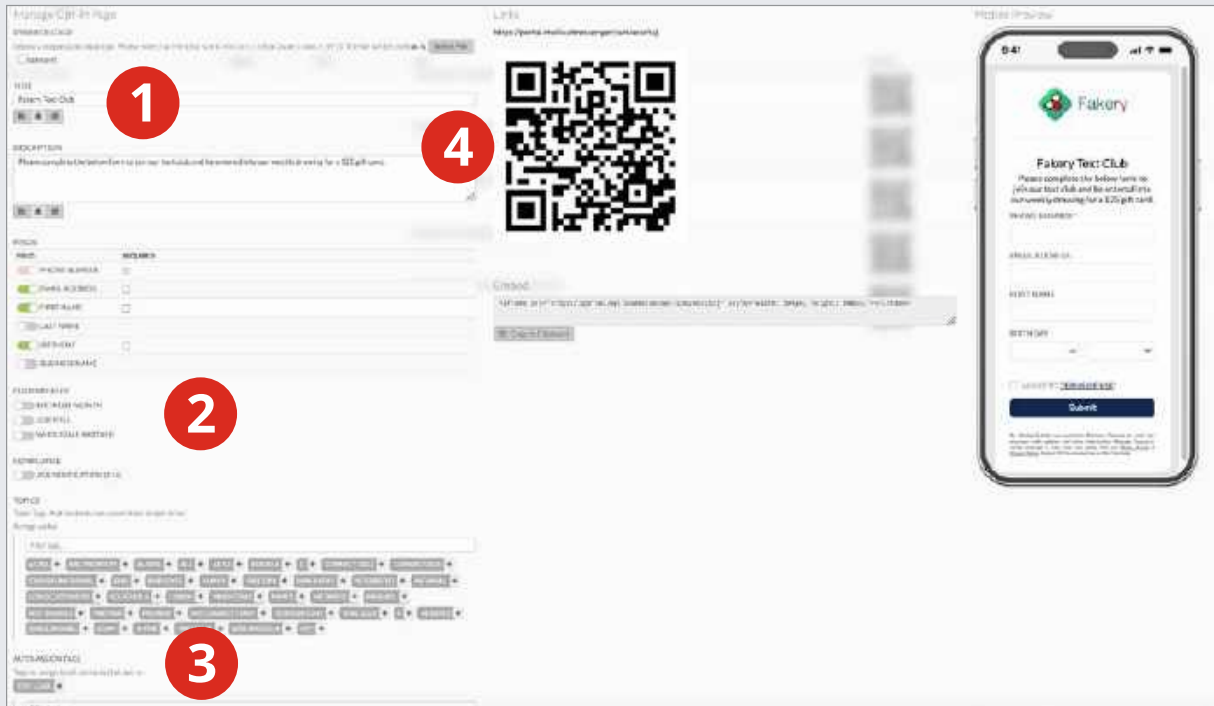
Keyword Assignment

To add a Keyword, enter it into the field at the top of the keyword screen and click Add Keyword. Then, under Assignments, click Add Assignment, match it up to the desired Operation, and click Save.

Note: you can have multiple keywords assigned to the same operation.

Opt-In Pages

Opt-in pages allow your contacts to easily subscribe to receive text messages from your business. Opt-in pages can be found under the Admin menu in the upper right-hand corner.



Creating Opt-In Pages

1. Create a new page by clicking Add Page
 - Enter a descriptive title for your opt-in page.
 - Add a clear description to communicate what contacts will receive by subscribing.

Optional: you can override your primary organization's logo and submit button color to customize opt-in branding.

2. Choose the information you'd like to collect from the subscriber
 - Select the contact information you want subscribers to provide (e.g., name, phone number, email, custom fields). You can also determine which fields are required.
 - Limit fields to essential data to simplify subscription and maximize opt-in rates.

3. Managing Tags and Topics

- Apply tags automatically to new contacts upon submission for easy segmentation.
- Optionally, you can allow subscribers to choose topics of interest, enabling more personalized engagement.

Sharing Your Page

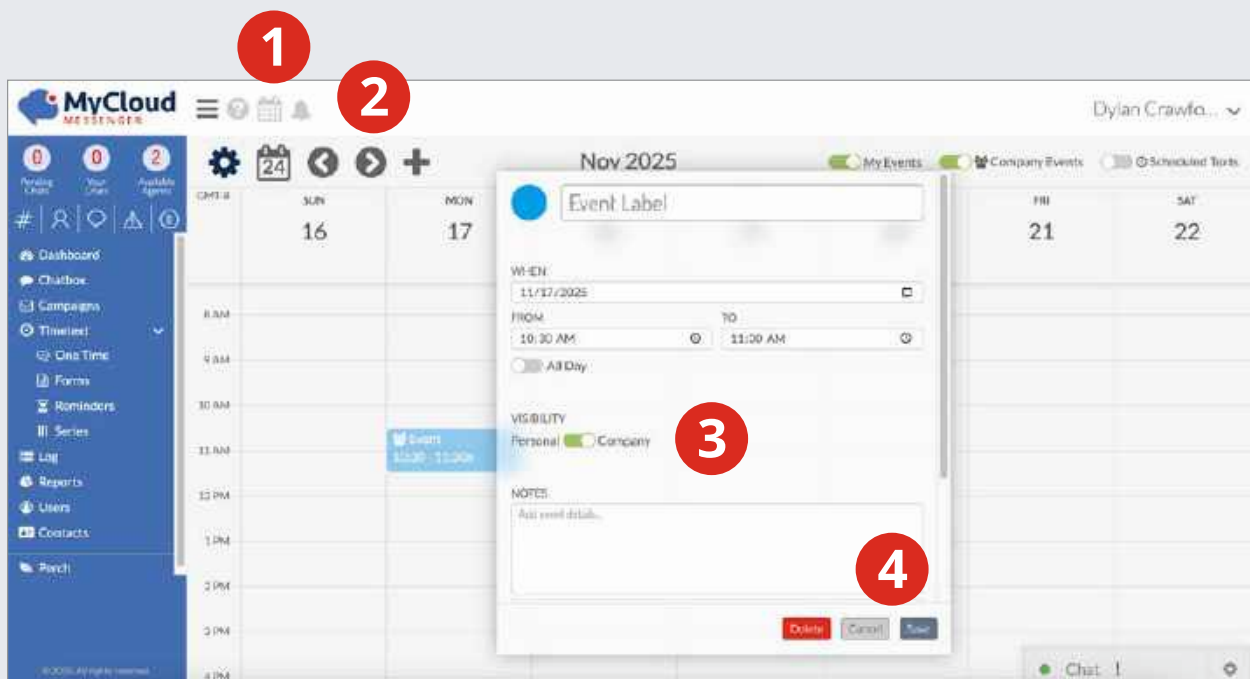
Once saved, use the provided URL or QR code to share your opt-in page. Alternatively, you can embed the page directly into your website using the provided iframe code.

Note: Once a subscriber submits their information, they will receive a confirmation text message asking them to verify their opt-in. Contacts will not be fully subscribed without replying YES to this message.

Calendar

Scheduling

You can easily add and modify company or personal events, meetings, and appointments and associate them with contacts using the MyCloud Messenger calendar.



1. Click the Calendar icon in the top toolbar
2. Create a new event by clicking on a time slot or the '+' button at the top.
3. Enter event details such as event type, name, location, notes, and associated contact and click Save.
4. Use drag-and-drop to easily adjust events to new dates and times.
5. To update, click on an event, modify details, and click Save. To delete, select the event and choose Delete.

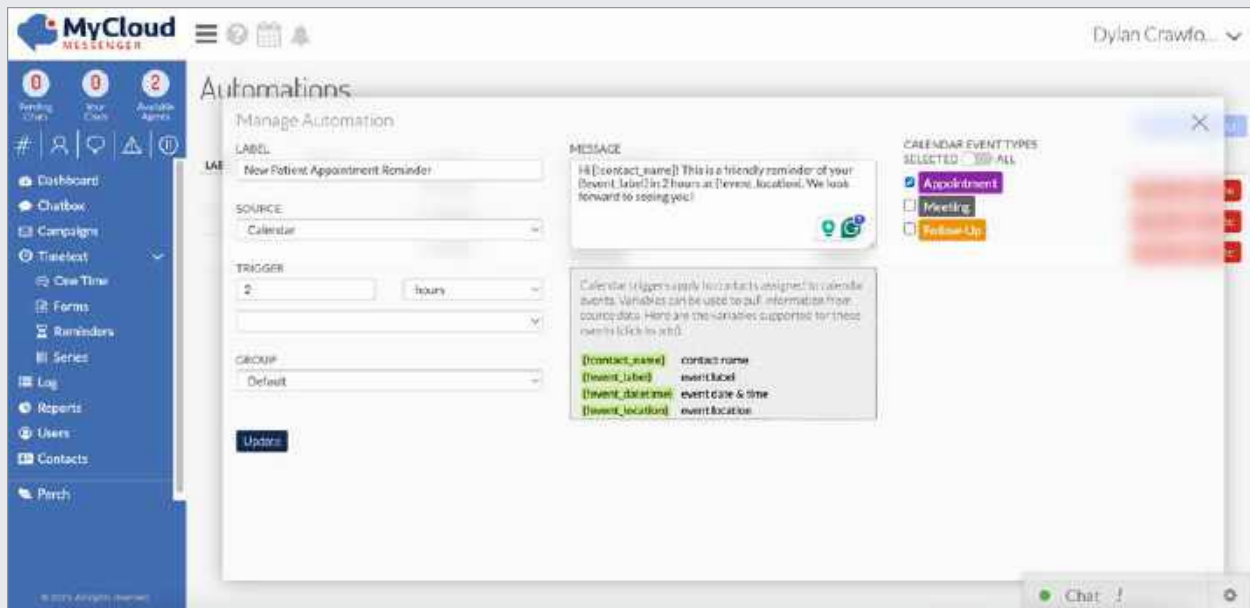
Note: you can also create events directly from a specific contact.

Customization

You can easily adjust what your calendar displays using the toggles at the top right corner of the calendar. You can choose to show or hide your personal or company events as well as show or hide any scheduled text message.

Automation

Automate your event-related communications to save time and improve customer engagement.



1. Navigate to Automations in the Settings menu.
2. Click Add Automation and provide a name for your automation.
3. Select Calendar as the source and configure your trigger and timing preferences.
4. Design your message template using event variables (such as contact name, event details).

Links

MyCloud Messenger links allow you to easily create a shortened link that points to a web address of your choice. Once in place, you can easily track clicks allowing you to understand not just deliverability but engagement. Links can be found under the Admin menu in the upper right-hand corner.

To create a new link, simply enter a name for your link, add the web address you would like the MyCloud Messenger link to point to, and click Create. After a link has been generated, you can easily copy it for use anywhere, or select and add it when creating a new Campaign.

Web Chat

In addition to text messaging, you can communicate with your customers using web chat. With a simple setup, you can quickly create another way your customers can reach you.

Adding the launcher

Web chat can be configured by clicking API under the settings menu in the upper right corner. First, select the group you would like to receive the web chat from the drop down. Then simply embed the code into your website where appropriate.

Web Chat

 Web Chat

To enable Pidj Web Chat, add this code to any page you want to feature it on.
We recommend adding it just before the `</body>` tag.

```
<!-- Start Pidj Chat Code (get yours at https://portal.mycloudmessenger.com) -->
<script type="text/javascript">
(function() {
var pc = document.createElement('script'); pc.type = 'text/javascript'; pc.async = true;
pc.src = 'https://portal.mycloudmessenger.com/chat/button/pc:f4d54703-83e3-514c-8db5-5705c064db2f:aXXqa.js?
t=' + Date.now() + '&q=gr:6dd8fa45-0b56-5eee-b8f7-33e612eacfd';
var s = document.getElementsByTagName('script')[0]; s.parentNode.insertBefore(pc, s);
})();
</script>
<!-- End Pidj Chat Code -->
```

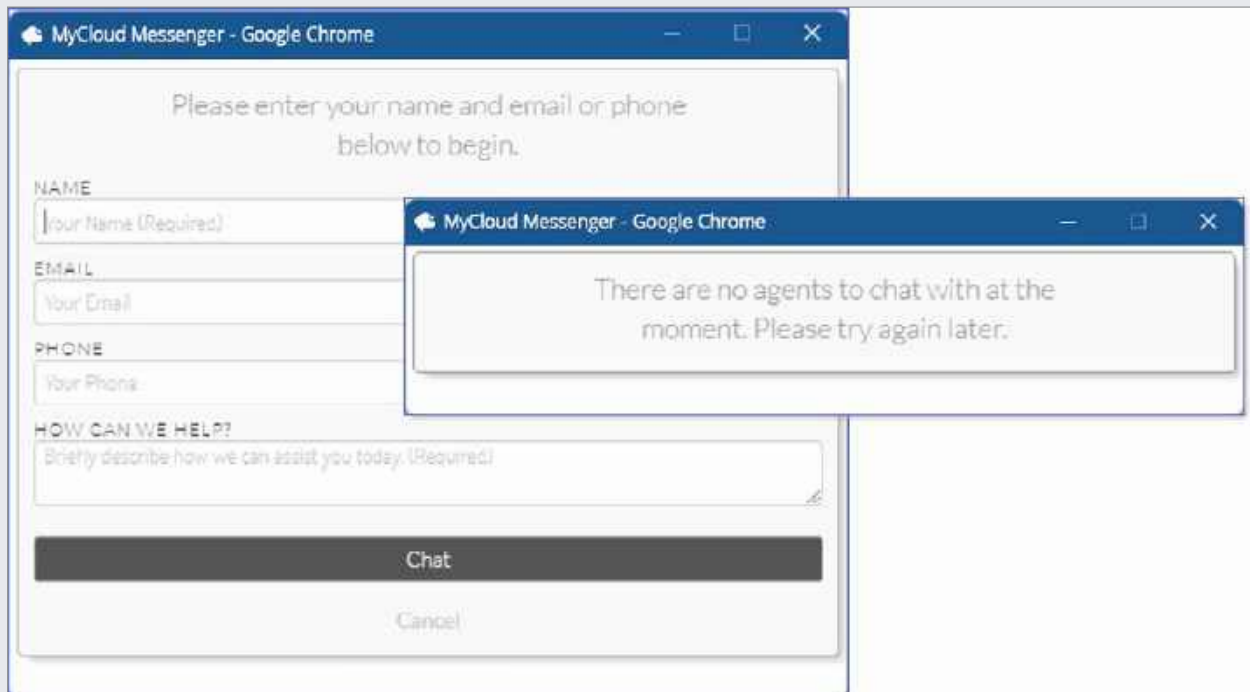
GROUP

main #

 Copy to Clipboard

Web chat interactions

Web chat interactions are initiated by clicking the icon, which is placed by default in the lower right portion of a web page. Users are required to enter basic information prior to starting the chat.



While similar to text interactions, web chat is simplified. While users are still able to transfer chats and access templates, they cannot send or receive pictures or bookmark messages. Users can also manage both text and web chat interactions simultaneously.

Settings

As an admin user, you can easily configure your account or group settings by navigating to the admin menu in the upper right-hand menu and choosing settings or groups respectively. Let's take a quick look at a few important settings.

Portal Branding & Customization

MyCloud Messenger allows you to easily customize your MyCloud Messenger portal to match your organization's branding.

- **Logo** - Upload a cropped and ready logo with ideal dimensions of 400 px x 118 px. Ensure your file is prepared, as it will be displayed exactly as uploaded.

- **Navigation Menu Background** - Specify the navigation menu background color using a color code or simply use the embedded color-picker.
- **Virtual Contact Card** - Choose what information you want to be included when sending a virtual contact card. Auto-replies

Auto-replies

Auto responses can be configured within your Primary or any additional group by editing that group's settings. There are a few options available to customize your customer interaction.

- **Off-hours** - send an automated response if the text comes in outside of business hours
- **Welcome** - send an automated welcome message when a text comes into the group
- **Farewell** - send an automated farewell message when an interaction within that group is ended
- **Unavailable** - send an automated response if all agents assigned to the group are logged out or unavailable

Notifications

Notifications can be configured to send emails and/or text messages if chats are neglected or even every time a new interaction is started.

- **Neglected chats** - can be configured at the group level to notify users after a certain period of time that there is an unattended chat. Notifications follow the user's preferences set in their profile.
- **New interactions** - can be configured only at the account level and will send a text OR email any time a new interaction is started in any group with any individual.

Compliance

MyCloud Messenger provides straightforward compliance settings to ensure your text messaging adheres to important regulations, protecting both you and your contacts. Below are the key compliance settings you need to configure in your account.

Sender Information

Sender Name: Identifies to your recipients who the text is from by including your organization's name at the start of each message.

- **Help Contact Phone** - Displayed in auto-reply HELP responses and auto-generated terms of use to guide users who need assistance.

Legal Links

Terms of Use URL: Link recipients directly to your organization's Terms of Use. If left blank, a default terms page will be provided.

- **Privacy Policy URL** - Similarly, link to your organization's Privacy Policy or use the provided default.

Opt-In/Opt-Out Management

Choose whether opt-outs (replying STOP) apply per individual group or across all groups within your organization.

Automated SMS Consent Handling

- **Enable Automated SMS Consent** - Highly recommended for TCPA compliance. This automated feature ensures explicit consent is always confirmed.
- **Consent Collection** - Set to either "New" (only collects consent from new numbers) or "All" (collects consent from all numbers interacting with your account).

Contact Direct Edit Page

Easily configure what contact information you want your subscribers to self-manage by editing your Contact Direct Edit page. Choose fields such as email address, name, business name, birthday or any custom contact fields you've created. Then simply add the edit action to a keyword operation.

Mobile Application

MyCloud Messenger has gone mobile with the MyCloud Messenger mobile app for Apple iOS and Android. This free mobile app is available for download in the App Store in the Google Play Store and for use by all active MyCloud Messenger users.

Mobile Application Use & Functionality

The MyCloud Messenger mobile app gives users access to the most common functions and features of the MyCloud Messenger platform, allowing them to manage communications from anywhere, anytime. The core features available within the mobile app include:

Chat

Allows users to send and respond to one-on-one conversations.

Campaigns

Allows users to send targeted messages to different audiences based on their unique criteria using the assigned contact tags within the platform.

Mobile Application Access

For those who already have an active MyCloud Messenger account, you can download the mobile app by searching for “MyCloud Messenger” in the App Store on your iOS device and in the Google Play Store on your Android device. Once downloaded, users can access their accounts using the same credentials used to access the platform online.



DOWNLOAD
The MyCloud Messenger
iOS Mobile App



DOWNLOAD
The MyCloud Messenger
Android Mobile App