

SMS Platform — Friendly First-Time Setup User Guide.

Before you start (what you'll need)

- A **Windows PC** with **Microsoft Excel (desktop)**.
- Your **welcome email** (it includes your **License Email & License Key**).
- Mobile App and Windows Desktop App:
 - Download the **KDE Connect** App for Android (Play Store) & your PC (Microsoft Store)

Areas we recommend you edit:

- **Control Tab** = Default device, kdi-connect-cli, license email, license key & default country code.
- **SMS Tab** = All areas.
- **Templates Tab** = All areas.

Step 1 — Download & open the Excel file

1. Download the .xlsm file you were given (don't open in your browser—**save** then open in Excel).
2. When Excel shows the yellow bar "**Security Warning: Macros have been disabled**", click **Enable Content**.
 - If you don't see the button or IT blocks macros, ask IT to add the file's folder to **Excel → Options → Trust Center → Trusted Locations**.
 - If enabling macros from the trust center still doesn't activate macros, then go to where you saved your file and in that folder right click on the excel file > properties > at the bottom of the general tab check "unblock" (Check this [website for details](https://support.microsoft.com/en-us/topic/a-potentially-dangerous-macro-has-been-blocked-0952faa0-37e7-4316-b61d-5b5ed6024216))
 - Once macros have been enabled, close file and reopen.

Step 2 — Activate license & add details (CONTROL tab)

1. Go to the **CONTROL** tab.
2. Click on the button named “All Unprotected” first so you can add your own information in the cells.
3. If you happen to get asked for a password, try this **ThisSMSLock@321!Protected**
4. On the right side (column H) you need to input your data to activate the platform.
 - **H2** = Once you connect your phone & PC with KDE Connect, your phone will load here.
 - **H3** = Leave as TRUE if H2 loads phone name or FALSE if loads ID number.
 - **H4** = Location where KDE Connect installed on your PC (Very Important) enter manually or click button “Auto-populate KDE Connect CLI Path”
 - **H6** = License email is where you input the email used to register.
 - **H7** = License key is the code we sent to your email when you registered.
 - **H12** = Lookup provider is optional, this is if you want Twillio to check numbers for you to remove landlines.
 - **H13** = If you decide to use Twilio, then you need to input your account SID & Token here.
 - **H17** = Default Country Code, this is where you enter the prefix country code you plan on using.
5. Leave everything else as is, if you happen to delete or edit anything else, you can always go back to the website and redownload the excel file.
6. Click the **Check License** button on the left.
 - You should see a success message. If it says inactive, make sure H6 matches the checkout email exactly.

Note: **H8 (License URL)** is red/admin-only—ignore it.

Step 3 – How to connect Excel to phone using KDE Connect.

1. Once all data is input on column H (previous step) now all you need to do is confirm your phone is connected properly.
2. Click on “Scan Devices (Populate Pickers) to load any phone you currently have using KDE Connect.
3. Then click “Device Picker: Refresh”
4. Followed by “List Devices”

5. Now to check if phone is connected just click on the drop down menu on the H2 cell and your phone should load here (make sure your phone and PC are on the same wifi), once it does just select it, if not, go to the “Devices tab and see if your phone has been recognized, you need to have the “TRUE” statement on both “reachable” & “paired” columns (C1 & D1) if not just repeat steps 2-4 until it does.
6. Then on your phone open the KDE Connect App (if not already opened) and ensure the SMS plugin is enabled on both your Android phone and desktop, and grant your Android phone the necessary SMS permissions via the KDE Connect App or Phone settings.
7. On your Android, make sure the **default SMS app** and **default SIM** are what you want to use.

Step 4 — Create message templates (TEMPLATES tab)

1. Go to **TEMPLATES**.
2. You will have some example templates, that you can delete if you want or create new:
 - **A1: Template Name:** = This is just the name you will use when you want the template imported to the SMS you will be sending.
 - **A2: Body** = In this area you will create the message for the template, using placeholders (examples mentioned on column D) you can create any amount you need.
3. Available placeholders (they auto-fill from the SMS tab):
 - {first}, {last}, {city}, {state}, {now} (current date/time)

Example template body

Hi {first}, this is a quick reminder for your pickup in {city} today. Reply STOP to opt out.

Step 5 — Maintain your do-not-text list (OPT_OUT tab)

- **Column A** = phone numbers that must not receive messages
 - **Column B** (optional) = note/reason
- If someone asks to stop, add their number here. Our platform will **skip them automatically**.

Step 6 — Prepare recipients & messages (SMS tab)

- **A** = Phone number (Don't use country code if you plan to use Default Country Code H17 from the Control tab).
- **B** = Message (Optional, leave blank if you plan to use the template function)
- **D** = Template Name/ID (e.g., welcome) — If set, it will build the message for you
- **E** = First name (used by {first})
- **F** = Last name (used by {last})
- **G** = City (used by {city})
- **H** = State (used by {state})

Tip: Use either **B (direct message)** or **D (template)** for each row. If both are filled, the template usually takes priority.

Step 7 — Send!

1. On the **SMS** tab, click **Send Test (row 7)** to send just the 1st row (good for verifying).
2. When happy, click **Send All** to process all rows with phone numbers in column A.

The platform automatically:

- Checks the **OPT_OUT** tab and **skips** blocked numbers.
 - Applies a **drip/pacing** schedule to reduce spam risk (Configured to send around 950 SMS for every 8hrs)
 - Logs results in the **LOGS** tab (timestamp, phone, result, notes).
 - Generates statistics based on the logs tab.
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Where things are (quick map)

- **CONTROL**: your device selection (H2), license (H6/H7), and other account settings.
- **TEMPLATES**: your saved message templates (A/B).
- **OPT_OUT**: your do-not-text numbers list.
- **SMS**: your send list—numbers, messages or template IDs, and merge data (E–H).
- **LOGS**: history of sends and outcomes (view-only).
- **STATISTICS_V2**: Your stats on how your lists are working (received, failed, response, etc)

New AI Feature for Templates & Troubleshooting.

Now you have the option to add your own **OpenAI API Key** on the CONTROL tab to further help you fix any issues you may be having with our Phone SMS platform and to also help you create new templates and keep your messages looking fresh, further avoiding getting flagged by your carrier provider.

- First go to [OpenAI.com](https://openai.com) and if you don't have an account already, create one.
- Once logged in go to the "Settings" icon (top right corner, next to your profile picture)
- This will open a new page where you will select "API Keys" from the left side menu.
- Then just click "Create New Secret Key" and follow the instructions – Name it, select default project and finally click on create secret key. This will show you your "Secret Key" just copy it and click done.
- Never share your secret key with anyone, and if you happen to misplace it or it stops working in the future, just delete and create a new one.

*Remember OpenAI (ChatGPT) will charge you for the API service, if you have any questions about terms or policies, please visit <https://platform.openai.com/docs/pricing> for pricing models.

*Remember this AI feature is optional and is not required by the Phone SMS platform.

Good sending practices (keep your number healthy)

- Send only to people who **opt-in**.
 - Include **opt-out** instructions on your message (e.g., "Reply STOP to opt out").
 - Avoid spammy formatting (ALL CAPS, lots of emojis, shortened public links).
 - Don't blast late at night; stick to normal hours.
 - Start with small batches (100 - 200 a day) and scale up gradually.
 - Use different templates messages every so often (Use ChatGPT for help)
 - If you get blocked or flagged just buy another SIM and restart process.
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Troubleshooting (fast fixes)

- **No “Enable Content” button:** Ask IT to trust the file location to allow macros or click on properties and allow through there (Step1 - 2).
 - **License says inactive:** Check that **H6** matches your checkout email; verify you pasted the **key** exactly; click **Check License** again.
 - **KDE Connect not found:** Ensure PC/phone are on the same network and paired; click **Scan Devices** again or reload **KDE Connect CLI path**.
 - **Wrong SIM used:** Android uses your phone’s **default** SMS App/SIM—change it in your phone settings.
 - **Messages not sending:** Check that the number format is correct; try a single test row; verify your route (KDE Connect CLI path) is correct or ping your phone using the KDE Connect App for Windows.
 - **Too many messages too fast:** The drip is automatic; just wait—pacing is intentional.
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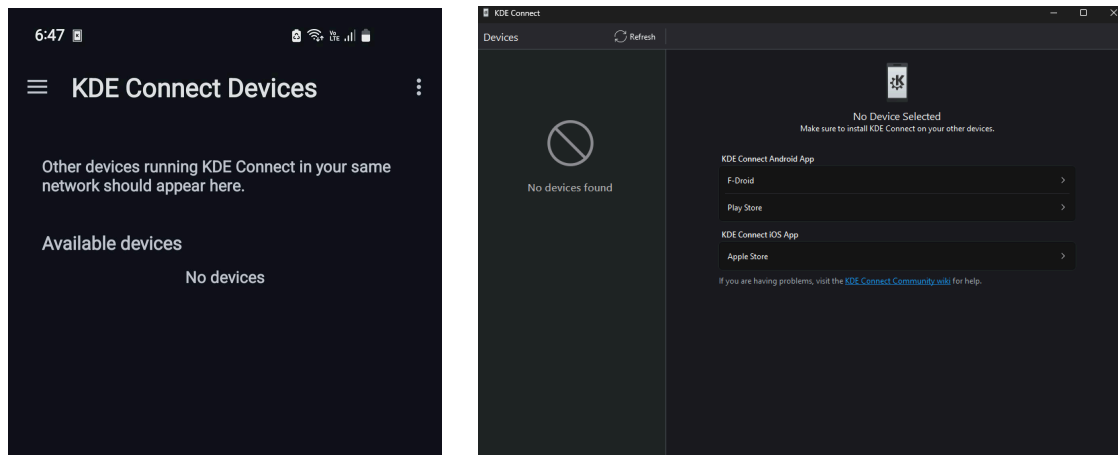
Updating to a new version

When you receive a new workbook version:

1. Download/open the new .xlsm.
2. In **CONTROL**, re-enter all your data, from license mail to KDE Connect CLI patch and reconnect your phone (Check Devices tab).
3. Copy your **TEMPLATES**, **OPT_OUT** entries and **LOGS** if needed for Statistics to keep loading prior to update.

Key steps to remember.

1.- Remember to always check if your Android phone is connected to your PC through the KDE App, if the platform doesn't seem to work it's because your phone might be disconnected.



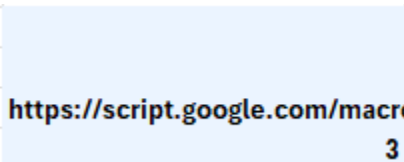
Both App and PC, need to show your connected device, always send a PING to make sure.

2.- Make sure to allow SMS permissions on your phone through the KDE Connect App, as this will allow our platform to send SMS on behalf of your phone.

3.- Make sure not to delete or edit and always have the latest URL (Exec) link.

Latest URL Exec (September 2025)

https://script.google.com/macros/s/AKfycbw-7uzEoq7I3_0OU7zUuxqKH3PIfWDwflv_hCJBeMguATYPml-AmWLBiQNRmeHgsyzd/exec

License Email	
License Key	
License URL (/exec)	
Grace Days	

If you need this link again, you can always email us at hello@mobileappstarter.com or download most recent documentation from phonesms.investor1properties.com