MsgPilot Help

Welcome to MsgPilot

MsgPilot is a smart and practical application designed to help you send bulk SMS and Email messages clearly, quickly, and professionally — without complexity.

Whether you are managing customers, employees, students, or members, **MsgPilot** gives you a simple way to communicate with many people at once, while still keeping every message personal and accurate.

What MsgPilot is designed for

MsgPilot is built for organized messaging, not chatting.

It helps you:

- Send bulk SMS using your phone's native messaging system
- Send bulk Email using your own email account
- Personalize every message automatically using your data
- Preview messages before sending to avoid mistakes
- Receive clear reports showing what was sent and what failed
- Everything is designed to be transparent, controlled, and easy to understand.

How MsgPilot works in simple terms

You prepare your message once, and **MsgPilot** sends it individually to each recipient using their own data.

You can:

- Import data from Excel or CSV files
- Use phone contacts
- Insert dynamic fields like names, amounts, dates, or any other column using @
- Send messages in one click
- Review results immediately after sending
- **MsgPilot** sends messages only when you request it and only with the content you write.

Why people use MsgPilot

People choose **MsgPilot** because it is:

- Simple – no technical knowledge required
- Efficient – saves time compared to manual messaging
- Clear – you always know what will be sent
- Flexible – works for many use cases:
    - Schools
    - Companies
    - Clinics
    - Shops
    - Associations
    - Personal business communication

Important things to know

- SMS messages are sent using your device's system, so required permissions must be allowed.
- Email messages are sent using your own email account, after proper setup.
- **MsgPilot** does not send hidden messages.
- **MsgPilot** does not store your message content externally.
- Some limits or features may depend on your current plan.
- All of this is explained clearly inside the app's Help sections.

Designed to guide you

MsgPilot includes built-in Help and Q&A sections that explain:

- How to use each screen
- How to set up Email correctly
- How to send SMS and Email safely
- How to solve common issues

You are always guided step by step, so you can use the app with confidence.

In short

MsgPilot helps you communicate better — with clarity, control, and confidence.
You write the message.
MsgPilot delivers it efficiently.

Brief about MsgPilot Privacy Policy

- MsgPilot respects your privacy and is committed to protecting your personal information.
- The app collects only the information needed to:
- Create and manage your account
- Provide messaging services
- Improve app functionality and reliability

Your data is:

- Used only within the app's purpose
- Not shared with third parties without legal requirement
- Stored and handled securely
- By continuing to use MsgPilot, you confirm that you have read and understood the Privacy Policy.
- You can review the full Privacy Policy at any time from within the app.

Brief about MsgPilot Terms of Use

MsgPilot is provided to help users send messages efficiently and responsibly.
By using the app, you agree to:

- Use MsgPilot for lawful purposes only
- Respect local regulations related to messaging and communication
- Use your own data and contact lists responsibly

You are responsible for:

- The content of messages you send
- Ensuring recipient consent where required
- Keeping your account credentials secure
- Misuse of the app may result in limited access or account restrictions.
- By continuing, you confirm that you have read and agreed to the Terms of Use.

Welcome & Language Guide

About this page

- This page appears when you open MsgPilot.
- It allows you to:
- Select the language of the app
- Read a few important notes before continuing
- Decide whether to show this page again in the future

Language selection

- You can choose the language you want to use in MsgPilot.
- The selected language is used for the entire app
- English is the default language
- Supported languages include:
  - English
  - Arabic
  - Portuguese
  - Swedish
  - German
- Note: you can change the language later from Language Settings, language.

New users

- If you are new to MsgPilot:
- Please register first
- Make sure your email address is correct
- Your email may be required later for verification and access

Existing users

- If you already have an account:
- Go to the Login screen
- Sign in normally

App instructions & important notices

- After login:
- Please read the app instructions carefully
- Important messages may appear before exiting the app
- Reading these notices helps ensure correct usage and better performance.

Continue

- Press OK to continue using the app with your selected language.

Don't show this page again

- You can choose not to show this page again.
- If selected:
- This page will not appear on future app launches
- You can enable it again later from Settings if needed.

Continue

Welcome Screen

- When you press OK on the guide page:
- You are taken directly to the Welcome screen
- This screen introduces MsgPilot briefly
- From there, you can start using the app
- On the Welcome screen:
- Press Get Started to continue
- The app will then move you to the next step (login or registration, depending on your status)

Login Screen

About this screen

- This screen is used to access your MsgPilot account.

Logging in

- If you already have an account:
- Enter your registered email address
- Enter your password
- Press Login to access your tools
- Make sure the email and password are written correctly.

New users

- If you are new to MsgPilot:
- Press Create to start creating a new account
- Follow the instructions shown on the registration screen
- For more details about creating an account, please refer to the Register section in this guide.

Forgot your password

- If you forgot your password:
  1. Enter your email address first
  2. Press Forgot password
  3. Check your email inbox (and spam folder if needed)
  4. Follow the instructions in the reset email
  5. Set a new password
  6. Close the email and return to the Login screen
  7. Enter your email and new password to log in

Need help?

- If you face any other problem:
- You are welcome to contact us using Contact Us

Register Screen

About this screen

- This screen is used to create a new MsgPilot account.
- It collects the required personal and login information needed to register and access the app.

Required information

- To create an account, you need to fill in the required fields marked with an asterisk (*).
- These include:
- First name
- Email address
- Mobile number
- Country
- Password
- Repeat password
- You must complete all required fields before you can register.

Optional information

- Family name is optional and can be left empty.
- Date of birth (day, month, year) can be selected if required.

Choosing your country

- Select your country from the country list.
- This helps the app correctly identify your region.

Creating your password
- Enter your password in the Password field.
- Enter the same password again in Repeat password.
- Make sure both passwords match.
- You can use the visibility icon to show or hide the password while typing.

Terms and Privacy
- Before registering, you must:
- Read and agree to the Terms
- Read and agree to the Privacy Policy
- Registration is not possible until this option is checked.

Completing registration
- Once all required information is entered correctly and the terms are accepted:
- Press Register
- Your account will be created

Already have an account?
- If you already have an account:
- Press Login
- You will be taken to the Login screen

Important notes
- Make sure your email address is correct and active, as it is required for account verification and access.
- After completing registration, please check your email inbox and spam folder.
- You will receive a verification email — open it and confirm your account using the link provided.
- Once your email is verified, return to the app and log in using your email and password.
- Keep your password safe and do not share it with others.
- If registration does not complete successfully, review the required fields and try again.

Contact Us

Sometimes you just need a quick hand — this page lets you reach the MsgPilot team directly.

When to use Contact Us
- Use this page if you:
- Face a problem using the app
- Can't access your account
- Need help with something that isn't clear in Help or Q&A

How to send your request
1. Enter your email address (mandatory)
   We need it so we can reply to you.
2. Write your message clearly (what happened, and what you need help with).
3. Submit your request.

Before you send
- Please double-check your email address is correct and active.
- After you submit, keep an eye on your Inbox and Spam folder for our reply.

Thank you
- The MsgPilot team is keen to help and support you.
- We will respond to your request within 48 hours — please check your registered email inbox/spam to receive our answer.

MsgPilot Tips (After Login)

After login, MsgPilot may show a short Tips page to help you choose the best sending setup on your phone.

SMS Sending Options

1) Best method (recommended): Set MsgPilot as your Default SMS app

Turn Live ON, then press Set default.

If your phone blocks it (some Xiaomi/OEM devices), set it manually from: Settings → Apps → Default apps → SMS app

2) Alternative method

You can press Try anyway and send without making MsgPilot default.

This works on many phones.

Email Sending

If you plan to send bulk emails, please configure your email one time from: Settings → Email Setup

For more help, read the Email Setup guidance.

Continue

Press OK to continue to the home screen.

Don't show again

- If you select "I understand. Don't show this page again."
- This Tips page will not appear again when you open the app.

If you want to show it again later:

- Go to Settings and use Restore Tips.

Home Screen

What this screen is

- The Home screen is the main dashboard of MsgPilot.
- From here, you can access all core functions, manage your account, and reach help or support when needed.
- For better understanding of any section, or if you face any problem, please read the related Help guide for that section.

Welcome card & personal information

- At the top of the Home screen, you will see a welcome area showing your name and photo.
- Your name is taken automatically from the information you entered during registration.
- You can update your name later from Profile under Settings.
- (For more details, read the Profile Settings help.)
- Your photo is stored locally on your device.
- You can add or change it from Profile Settings.
- Company information appears here if you have added it in Settings.
- Your current plan status is handled automatically by the app based on your account.

Send SMS

- Use Send SMS to send bulk SMS messages in a simple and efficient way.
- With Send SMS, you can:
- Import recipient data from an Excel or CSV file
- Design your dynamic message using placeholders
- Personalize messages automatically for each recipient
- Preview messages before sending
- Send all messages with one click
- For full instructions, please read the Send SMS Help section.

Send Email

- Use Send Email to send bulk emails using your configured email settings.
- With Send Email, you can:
- Import recipient lists from Excel or CSV
- Create and customize your email message
- Personalize email content
- Preview before sending
- Send emails efficiently in one process
- For full details, please read the Send Email Help section.

Send SMS + Email

- Use Send SMS + Email when you want to send both SMS and Email together to the same list.
- This option allows you to:
- Import one list
- Prepare SMS and Email messages
- Send both channels in a single flow
- For full guidance, please read the Send SMS & Email Help section.

Templates

- The Template option provides the MsgPilot Excel template used for preparing your contact lists.
- This template helps ensure your data is structured correctly before importing.
- For more details, please read the Templates Help section.

Upgrade

- The Upgrade option shows your available plan options.
- Your access level is handled automatically based on your current plan.
- For plan-related details, please read the Upgrade Help section.

Settings

- Use Settings to control app preferences.
- From Settings, you can:
- Change the app language
- Manage profile settings
- Restore tips and guide pages if you hid them before
- For full explanation, please read the Settings Help section.
- Here is the rewritten version of ONLY that section, in a friendly, clear, simple tone, ready to copy & paste.

Email Settings

- If you plan to send emails using MsgPilot, you need to set up your email account carefully.
- Enter your email details correctly in Email Settings
- Follow the instructions provided in the Email Settings Help
- Because email setup is an important step, MsgPilot includes a built-in Email Setup Guide inside the Email Settings screen.
- You can open this guide at any time by pressing Email Setup Guide to make sure your settings are correct before sending emails.

Profile

- Use Profile to view or update your personal information.
- From Profile, you can:
- Edit your name
- Change your photo
- Update personal details
- For more information, please read the Profile Settings Help.

Restore Tips

- If you previously chose to hide guide or tip screens:
- Use Restore Tips to show them again
- This is useful if you want to review the guidance later.

Help & Q&A

- The Help section is designed to support you while using MsgPilot.
- It includes:
- Help: a complete step-by-step guide for all screens
- Q&A: answers to the most common situations and questions users face
- If you need guidance, start with Help.
- If you have a specific question, check Q&A first.

Contact Us

- Use Contact Us to reach the MsgPilot team directly.
- This section is for:
- Support requests
- Issues you cannot solve using Help or Q&A
- For more information, please read the Contact Us Help section.

Logout

- Use Logout to safely exit your account from the app.

Helpful notes

- Some options may appear or be restricted depending on your plan.
- Always refer to the related Help guide for any screen if something is unclear.
- MsgPilot is designed to guide you step by step—Help is always there when needed.

Permissions Guide

To make sure MsgPilot works properly, the app asks for some permissions the first time you use it.
Each permission is requested only for a specific purpose related to sending messages.

Contacts permission

- This permission allows MsgPilot to read your contacts.
- It is needed if you want to:
- Select contacts directly from your phone
- Send bulk messages to selected contacts
- MsgPilot:
- Reads contacts only when you choose to use them
- Does not change or delete any contact data
- If you do not plan to send messages using phone contacts, you may skip this permission.

SMS permission

- This permission allows MsgPilot to send SMS messages.
- It is required to:
- Send SMS messages that you write
- Deliver bulk SMS messages using your phone's system
- Important notes:
- MsgPilot does not send hidden messages
- MsgPilot does not send messages in the background
- MsgPilot does not store or resend your messages
- Only the messages you create and confirm are sent
- Without this permission, SMS sending will not work.

Storage permission

- This permission is required only in specific cases.
- It is needed if you want to:
- Import Excel or CSV files when preparing bulk messages
- Import files to be used as email attachments
- MsgPilot:
- Accesses storage only when you choose to import a file
- Does not scan or use your files automatically
- If you do not import files, this permission is not required.

Why permissions are important

- Each permission is requested to ensure:
- Correct message sending
- Proper file importing
- Smooth app operation
- You can allow or deny permissions based on how you intend to use MsgPilot.

Final note

- Granting the required permissions helps MsgPilot perform exactly what you ask it to do — nothing more and nothing less.

App Live & Live Toggle

What App Live means
App Live is used to set MsgPilot as the default SMS app on your phone.
This is recommended so MsgPilot can work properly on most devices when sending SMS.
When you turn App Live ON
MsgPilot displays a message with an Open button that leads to the Default SMS App settings.
Once MsgPilot is set as the default SMS app, the change takes effect immediately.
On the Home screen:
The SMS default status changes from OFF to ON.
The indicator turns green, showing that MsgPilot is active as the default SMS app.
Phones that need manual setup
On some phones (such as Xiaomi, Oppo, and similar brands), the Open button shown in the message may be blocked by the device manufacturer and may not open the Default SMS settings.
In this case, you need to set it manually by following this path on your phone:
Phone Settings → Apps → Default apps → Messages → Select MsgPilot
If you do not want to set MsgPilot as the default SMS app:
You can still use MsgPilot
When sending SMS, choose Try anyway

Please note:
MsgPilot may not work properly on some phones if it is not set as the default SMS app
Important note about changing back

- If you set MsgPilot as the default SMS app and later want to use your normal messaging app:
- Open your phone's original Messages app
- Choose Set as default
- This allows you to send and view messages normally in your preferred messaging app.

Permissions and App Live

- When you turn App Live ON:
- MsgPilot will request any required permissions if they are not already granted

To review or change permissions manually:

- Go to Phone Settings
- Select Apps
- Choose MsgPilot
- Open Permissions
- Grant or remove permissions as needed

Final notes

- MsgPilot works best when set as the default SMS app
- Some devices may have limited functionality if it is not set as default
- For more details or if you face any issue, please use Contact Us

Profile Screen

What this screen is
The Profile screen lets you review and update your personal account details used inside MsgPilot.
It also allows you to manage your profile photo and password.
If you need more detail about any section, please read the related Help guide.

What you can update here

Name

- Your name comes from your registration details.
- You can update it here if you want your Home welcome name to change.

Mobile number

- You can enter or update your phone number.
- This is useful for account details and contact reference inside the app.

Country

- You can select or update your country.
- This keeps your profile details accurate.

Birth date

- You can add or update your date of birth (day / month / year) if shown in your profile.

Profile photo

- You can add, change, or update your profile photo.
- The photo is stored locally on your device.
- After updating it, the Home screen welcome card will use the new photo.

Email (important)

- Your email is your account identity.
- The email cannot be changed from this screen.
- Make sure you always keep access to your registered email, because it may be used for verification and support.

Change password
- If you want to change your password:
- Use the Change Password option on this screen.
- Follow the steps shown to set a new password.
- After changing the password, use the new password the next time you log in.

Saving your changes
- After updating your information:
- Make sure to save so your changes take effect.
- Your updated profile information will be reflected in the app (especially name and photo).

Helpful notes
- Keep your profile information accurate to avoid account issues later.
- If you face any problem updating your profile or password, use Contact Us.

Email Settings & Email Setup Guide
- Why this setup is important
- Email Settings are critical for MsgPilot.
- If you plan to use:
- Send Email
- Send SMS + Email
- you must complete this setup correctly.
- Email sending in MsgPilot depends entirely on this configuration.

Step 1: Enter your email and password
On the Email Settings screen, you start by entering:
1. Your email address
2. Your email password

⚠ Very important
The password you enter here is NOT your MsgPilot password.
In most cases, it must be an App Password generated from your email provider after enabling Two-Step Verification.

About the email password (very important)
Use your Email Account password
Most email providers do not allow normal account passwords to be used by apps.

You must:
- Enable Two-Step Verification in your email account
- Generate an App Password
- Use that App Password in MsgPilot
- This applies to Gmail, Yahoo, Outlook, Hotmail, and many business emails.

How to get the App Password (by provider)
Gmail (Google)
1. Open your Google Account
2. Enable 2-Step Verification
3. Create an App Password
4. Copy the App Password
5. Paste it into the Password field in MsgPilot

Yahoo Mail
1. Open Yahoo Account Security
2. Enable Two-Step Verification
3. Generate an App Password
4. Use this App Password in MsgPilot

Outlook / Hotmail (Microsoft)
1. Open your Microsoft Account
2. Enable Two-Step Verification
3. Create an App Password
4. Enter this App Password in MsgPilot

Business / Company Email
- If you use a company or domain email (for example: name@company.com):
- Two-Step Verification or App Passwords may be required
- In many cases, your IT department must allow SMTP access
- Contact your IT team if you are not sure which password to use

Step 2: Continue to automatic setup
1. After entering:
2. Email
3. Correct App Password
4. Press Next.
5. MsgPilot will automatically:
6. Detect your email provider
7. Fill SMTP server, port, and security settings
8. Prepare the email configuration for you
9. This automatic setup works for most common email providers.

Step 3: Test & Save (single step)
1. Once all required fields are filled automatically:
2. Press Test & Save
3. This is one single button.
4. What happens next:
5. MsgPilot sends a test email to your configured email address
6. If the email arrives, the setup is successful
7. You will see a message confirming that Email Setup succeeded.

If the test email does not arrive
1. If you do not receive the test email:
2. Check your Inbox and Spam folder
3. Review the email address and password you entered
4. Make sure you used an App Password, not your normal email password
5. If automatic setup fails:
6. Switch to Manual Setup
7. Enter SMTP details manually

Manual email setup (when needed)
- Manual setup is used when:
- Automatic setup fails
- Your email provider uses special settings
- You are using a business or private email server
- In manual setup, you enter:
- SMTP server address
- Port number
- Security type (SSL or TLS)
- What these mean
- SMTP: the server used to send emails
- SSL / TLS: secure encryption methods required by most email providers
- Your email provider or IT department can give you these details if needed.

Business email note (important)
- For some business or private email systems:
- SMTP access may be restricted
- App access may require approval
- In this case:
- Contact your IT department
- Ask them to allow SMTP sending or provide correct settings

When setup is completed
- After a successful Test & Save:
- Email sending is enabled
- You can now use:
- Send Email
- Send SMS + Email
- You do not need to repeat this setup unless you change your email.

If you still face issues
- If email setup continues to fail:
- Review your entered data carefully
- Confirm App Password usage
- Try manual setup
- If the issue continues, please use Contact Us and the MsgPilot team will assist you.

Send SMS Screen

This screen helps you send bulk, personalized SMS quickly — using either an Excel/CSV file or your phone contacts.
For better understanding or if you face any problem, please read the related Help section.

Before you start (important)
- Make sure SMS permission is allowed.
- Make sure you have enough SMS credit/balance on your SIM card.
- If you import a file, ensure the phone number column is formatted as Text (so numbers that start with 0 are not damaged).

Step 1 — Choose how you want to import recipients

Option A) Import Excel/CSV file
- Import your file that contains the data you want to send.
- You may also use the MsgPilot template from the Home screen and follow the Template instructions.
- (For more details, read the Template Help.)

Option B) Import Contacts
- Search and select contacts one by one, or use Select All (if available in your screen).
- When you use contacts, MsgPilot will use the saved contact name for dynamic fields like @{Name}.

Step 2 — Select the correct phone column (for Excel/CSV)
After importing a file, choose the correct Phone column from the dropdown.
This is very important because MsgPilot uses this column to know where to send the SMS.

Step 3 — Write your message (dynamic or static)

Dynamic message (personalized)
While writing, type @ or press @ appeared on the screen and MsgPilot will show the list of your imported column headers.
Select the header you want, and MsgPilot will insert it into your message.

Example (School fees):
    File headers: Phone, Name, Student Name, Fees, Grade, Date …
    Message:
    Dear @{Name}
    Please pay @{Fees} for your student @{Student Name} in grade @{Grade}.
    The last payment date is @{Date}.
    Regards

Example (Salary slip):
    File headers: Phone, Name, Total Salary, Basic, Overtime, Deduction …
    Message:
    Dear @{Name}
    Your June total salary is @{Total Salary}.
    Details: Basic @{Basic}, Overtime @{Overtime}, Deduction @{Deduction}.
    Regards

Static message (same for everyone)
If you write a normal message without @ fields, MsgPilot sends the same text to all recipients.

Step 4 — Preview before sending
- Press Preview to view a sample message using the first row (or first recipient) so you can confirm:
- The phone column is correct
- Dynamic fields are inserting correctly
- The message looks exactly as you want
- If you want to change anything, edit the message and preview again.

Step 5 — Send
- Press Send to start bulk sending.
- A progress indicator will appear while sending.
- If MsgPilot is the default SMS app
- Sending will run directly.
- If MsgPilot is NOT the default SMS app
- A message will appear with two choices:
- Set default (recommended) or
- Try anyway (send without setting default)
- For more details, read the Set Default / App Live guide.
- Important: On some phones, MsgPilot may not work properly unless it is the default SMS app.

After sending (Report)
- When sending finishes, the Report opens automatically showing:
- Sent messages
- Failed messages
- with clear results for each row/recipient.

Quick reminders
- Allow SMS permission.
- Choose the correct Phone column (for files).
- Use @{Field} to personalize.
- Preview before sending.
- If sending fails on some phones, set MsgPilot as the default SMS app.

Send Email Screen

This screen helps you send bulk, personalized emails in a clear and professional way — using either an Excel/CSV file or your saved contacts.

For better understanding or if you face any issue, please read the related Help section.

Before you start (important)

- Make sure Email Setup is completed and tested successfully.
- Make sure you have an active internet connection.
- If you plan to add attachments, remember they will be the same for all recipients.

Step 1 — Choose how to import recipients

Option A) Import Excel/CSV file

- Import your own file that contains the data you want to send.
- You can also use the MsgPilot template from the Home screen and follow the Template instructions.
- (For more details, read the Template Help.)

Option B) Import Contacts

- Search and select contacts individually, or select all if available.
- When using contacts, MsgPilot uses the contact's name saved on your phone for dynamic fields like @{Name}.

Step 2 — Select the correct email column (for Excel/CSV)

- After importing a file, open the Send To dropdown and select the column that contains the email address.
- This step is essential so MsgPilot knows where to send each email.

Step 3 — Write the email subject (dynamic or static)

- While writing the Subject, type @ (or press to open the list of your imported column headers.
- Select the header you want to personalize the subject.
- If you write a subject without @ fields, the same subject will be sent to all recipients.

Step 4 — Write the email body (dynamic or static)

In the Email Body, type @ or press @ appeared on the screen to insert values from your imported data and create a personalized message for each recipient.

Example 1 — School fees

File headers: Email, Name, Student Name, Fees, Grade, Date …

Subject

Fees for @{Student Name}

Email body

Dear @{Name}

Please pay @{Fees} for your student @{Student Name} in grade @{Grade}.

The last payment date is @{Date}.

Regards

School Name

Example 2 — Salary slip

File headers: Email, Name, Job Title, Total Salary, Basic, Overtime, Deduction …

Subject

Salary @{Name} - @{Job Title}

Email body

Dear @{Name}

@{Job Title}

Please be informed that your June total salary is @{Total Salary}.

Details: Basic @{Basic}, Overtime @{Overtime}, Deduction @{Deduction}.

Regards

Company Name

Step 5 — Add attachments (optional)

You can attach one or more files to the email.

Important: Attachments are sent the same to all recipients.

Step 6 — Preview before sending

- Press Preview to see the first email using the first row (or first contact).
- This helps you confirm:
- Subject formatting
- Email body content
- Dynamic fields are inserted correctly
- You can edit the subject or body and preview again if needed.

Step 7 — Send

- Press Send to start sending emails in bulk.
- A progress indicator will appear while sending.
- When sending finishes, the Report screen opens automatically showing:
- Successfully sent emails
- Failed emails (if any)

Important notes

- Email setup must be completed and tested before using this screen.
- Internet connection is required.
- Attachments are shared across all recipients.
- Dynamic fields (@{Field}) personalize each email.
- Static text (without @) sends the same content to everyone.

Send SMS & Email Screen

This screen allows you to send personalized SMS and Email together in one step.
It is designed to save time by preparing one message flow and sending it to both channels where applicable.
For better understanding or if you face any issue, please read the related Help sections.

- What you can do on this screen
- You can send bulk, personalized messages by:
- SMS
- Email
- or both together, using one click send.
- Recipients can be loaded from:
- An Excel / CSV file
- Your phone contacts

Step 1 — Import recipients

Option 1: Import Excel / CSV

- Import a file that contains your data.
- You may use your own file or a MsgPilot template from the Home screen.
- Follow the instructions shown in the Template screen.
- (For more details, read the Template Help.)

Option 2: Import Contacts

- Search and select contacts individually, or select all.
- When using contacts, MsgPilot uses the saved contact name for dynamic fields such as @name.

Step 2 — Confirm target columns (important)

- After importing an Excel / CSV file:
- Make sure the phone number column is selected for SMS.
- Make sure the email column is selected for Email.
- If needed, open the dropdowns and manually select the correct columns.
- This step ensures messages are sent to the correct phone numbers and email addresses.

Step 3 — Build your messages (dynamic or static)

- You can build:
- SMS text
- Email subject
- Email body
- While typing, use @ to open the list of column headers from your imported data.
- Select the needed fields to create dynamic messages.
- If you write text without @ fields, the same message will be sent to all recipients.

Step 4 — Preview before sending

- Press Preview to see how the message looks using the first row of data. This helps you:
- Check message formatting
- Confirm dynamic fields are working correctly
- You can return, edit the content, and preview again if needed.

Step 5 — Send messages

- Press Send to start sending.
- SMS behavior
- If MsgPilot is set as the default SMS app, sending starts immediately.
- If MsgPilot is not the default SMS app, a message appears with two options:
- Try anyway (send without setting default)
- Set as default (follow the default SMS setup steps)

(For details, read the Set Default SMS Help.)

After sending

- Once sending is completed:
- The Report screen opens automatically.
- The report contains two separate tabs:
    o SMS Report
    o Email Report
- Each tab shows sent and failed results for that channel.

Important notes

- Make sure SMS permission is granted.
- Ensure you have sufficient SMS balance / credit.
- When using your own Excel file (not MsgPilot template):
- Set the phone number column as Text
- This avoids removing leading zeros for some countries.
- Email sending requires:
- Email setup completed and tested
- Active internet connection
- Attachments (for Email):
- Attachments are the same for all recipients
- When using contacts: @name uses the contact's name saved on your phone.