# SMSsouthafrica
### SPECIALISTS IN BULK SMS COMMUNICATION

# USER MANUAL
www.SMSsouthafrica.co.za

www.SMSsouthafrica.co.za
sales@SMSsouthafrica.co.za
011 – 568 2370                                                                                                    Page | 1

# 1    Table of Contents

## Send Bulk SMS

# 2    How to Order SMS Credits

To make **Purchases**, email [sales@SMSsouthafrica.co.za](mailto:sales@SMSsouthafrica.co.za)  the following information:

1.  Name:
2.  Username:
3.  Company:
4.  Email address:
5.  SMS credits required

−   You will receive an invoice via email (with our ABSA banking details).
−   Please fax or email proof of deposit to 086 602 0314 or [sales@SMSsouthafrica.co.za](mailto:sales@SMSsouthafrica.co.za) .
−   Once we have received proof of payment we will add the ordered credits to your account.

Should we add the ordered SMS credits to your account on receipt of order, payment is due 7 days after presentation of Invoice.

**Payment can be made by <u>Credit Card</u> using the link provided with Invoice. See example below.**

**(SAGE PAY)**

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sales@SMSsouthafrica.co.za
011 – 568 2370                                                                                                         Page | 3

# 3    How to Create Account

If you do not have a **Username** yet, please create an **Account** using the link below:

**http://www.smssouthafrica.co.za/signup.aspx**



# 4    Login

First **Login** with your **Username** and **Password** at **www.SMSsouthafrica.co.za**

**Number of Credits** in your account are in **red** in the bottom left corner.

# 5    Account Settings

You can **change the following here**:

1. **Change Your password** – Just enter the new one twice beside Password and Confirm Password, Click on Update Account
2. **Contact Information:**  name, email and phone numbers
3. **Time Difference** - If you are international, you can change your server time difference
4. **Low Credit Warning and Reporting** - Remove or change low credit warnings and summary reports that are sent to your email
5. **Forward replies to mobile or email** - Incoming messages from the SMS's you send can go to the cell (costs 1 credit) or email number you enter
6. **Send response to reply** – If someone replies to your message you can send a response (cost 1 credit)
7. **Forward data to URL** – If you want to have sent messages and replies forwarded to a website.  Technical help is required to have this set up

www.SMSsouthafrica.co.za
sales@SMSsouthafrica.co.za
011 – 568 2370                                                                                                          Page | 4

| | |
|---|---|
| Home Page | |
| **→** Account Settings | |
| Maintain Groups | |
| Maintain Numbers | |
| Import Data | |
| Single Message | |
| Bulk Message | |
| SMS Templates | |
| Reply Routing | |
| Replies | |
| BDay - Groups | |
| BDay - Numbers | |
| BDay - Import Data | |
| Sent / Queued | |
| Date Range report | |
| Number Lookup Report | |
| SMS Sending Report | |
| Summary Report | |
| Shortcode - Setup | |
| Shortcode - Incoming | |
| Sub-Accounts | |
| Sub-Accounts (Holding) | |
| Blacklist / Auto Deleted | |
| API guide | |
| Logout | |

**Your account details:**

| | |
|---|---|
| Username | DemoDemo |
| Password | |
| Confirm Password | |
| Name | Stephen Aggett |
| Company | SMSsouthafrica |
| Contact 1 | 0832580321 |
| Contact 2 | 0115682370 |
| Email | sales@SMSsouthafrica.co.za |
| Country of residence | South Africa (ZAF) ▼ |
| Credits | 10 |
| Account created | 15/Jun/2015 14:24 |
| Number Prefix allowed | 27 |
| Route | ZA |
| | |
| Current Server time | 16/Jun/2015 13:12 |
| Time difference (minutes) | 0 |
| Your account time | **16/Jun/2015 13:12** |

**Low Credit Warning:**

| | |
|---|---|
| Email | sales@SMSsouthafrica.co.za |
| Email when credits reach | 200 |

**"Opt Out" Email Notification:**

| | |
|---|---|
| Receive email when "opt out" received | ☐ True |
| Email | |

**Opt Out Confirmation:**

| | |
|---|---|
| Custom Opt Out Message | |

**Reporting:**

| | |
|---|---|
| Email | |
| Daily | ☑ Yes |
| Weekly | ☑ Yes |

**Cost Centre Default:**

| | |
|---|---|
| Cost Centre | |
| Display on SMS Single/Bulk page? | ☐ True |

**Update Account**

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sales@SMSsouthafrica.co.za
011 – 568 2370                                                                     Page | 5

# 6    Maintain Groups

It's important to start here and create one or more groups. Creating a Group is like creating a "Folder" in Microsoft Windows or similar. Groups allow the storage of many cell numbers to be placed where they will be easily found.

Example: Friends, Customers, Sales Team etc.

1. Enter **Group name** and **Group description**
2. **Sub-Accounts** – If you want to share that group with someone else who will also be sending SMS's. Sub-Account holders can have only Reading access, or they can Write SMS's. (see Sub-Accounts for more info)
3. Click on **Create Group**
4. Your created groups are displayed below.  **Numbers** is the number of mobile phone numbers in the group (e.g. 47 Downloaded = 47 numbers)
5. **Group Name, Description, and Sub-Accounts can be edited** – Click **Edit** for the correct group
6. **Share Group with Sub-accounts: Read** – they cannot edit the group, **Write** – they can edit the group
7. **Group can be deleted** - Click box above edit for the correct group. Click **Delete Selected**
8. Group can be **Exported** to Excel – Click on the word **Download**
9. **View groups from Sub-Accounts only (if Read or Write has been selected)**  or your account and Sub-Accounts

www.SMSsouthafrica.co.za
sales@SMSsouthafrica.co.za
011 – 568 2370                                                                                                                    Page | 6

# 7    Import Data (Numbers)



## 7.1   Insert single number

A single number can be entered into a group.

1. Select **Group to Insert to**
2. Beside **Number** enter **mobile number**
3. **Optional** - Enter **Value 1 – Value 6** (Column B to Column G in the Excel Spreadsheet) if you have more data to add to the cell number.  Make it similar to the numbers and descriptions already in your group.  (See **Bulk Import for more on Values**)
4. **Update if exists** – Update the cell number with new values if it already exists in the group
5. **Duplication** – SMSsouthafrica automatically does not let you import a duplicate number into the same group
   a) **Ignore -** Use this if you **don't want to check** to see if the mobile number **is in other groups**
   b) **Check all my groups** – Use this if you want to check to see if the mobile number is in **any other groups**
   c) **Check selected groups** – Use this if you want to check to see if the mobile number is in **certain groups**
6. **Deleted** – If you check this box, the number will not be imported if it is on the **Auto Delete** list (see **Blacklist/Auto Delete**)

www.SMSsouthafrica.co.za
sales@SMSsouthafrica.co.za
011 – 568 2370                                                                                      Page | 7

## 7.2   Bulk import (preparing your file)

Import data from an Excel workbook. It is important to save an Excel file in a CSV (Comma Delimited) format.

**Preparing your file:**

1. Open a new Excel workbook
2. Ensure your data is captured on sheet 1 of the workbook and not on any other sheet(s)
3. Remove all headings and other sheets that might contain data
4. All mobile numbers must be entered in column A, starting in row 1 with the first number in cell A1
5. Columns B to G are used to store information that allows for personalization of messages – the fields are alphanumeric and can be used for either alpha, numeric or a combination of alpha and numeric
6. Number formats allowed are 0831234567, 831234567, 27831234567, or "27831234567"
7. It is always advised to use the full international format number which starts with the country prefix 27831234567

**Message required example**

Dear xxxxxxxxxx your current SMS account balance is Rxxxxxxxxx, your payment due is Rxxxxxxx arrears is Rxxxxxx. Please use Ref xxxxxxxxx when making payment.

**Excel sheet example**

| | A<br>COLUMN A<br>(Phone Numbers) | B<br>COLUMN B<br>(value1) | C<br>COLUMN C<br>(value2) | D<br>COLUMN D<br>(value3) | E<br>COLUMN E<br>(value4) | F<br>COLUMN F<br>(value5) | G<br>COLUMN G<br>(value6) |
|---|---|---|---|---|---|---|---|
| 1 | | | | | | | |
| 2 | 27831234567 | Marc Peens | R2000 | R459.77 | R0.00 | 45532155 | |
| 3 | 27837654321 | Michelle Lerm | R1223 | R141.22 | R22.20 | 41609753 | |

**Message required example**

Dear @@value1@@, your current SMS account balance is @@value2@@, your payment due is @@value3@@, arrears is @@value4@@. Please use reference @@value5@@ when making payment.

**Result**

Dear Marc Peens, your current SMS account balance is R2000, your payment due is R459.77, arrears is R0.00. Please use Ref 45532155 when making payment.

Dear Michelle Lerm, your current SMS account balance is R1223, your payment due is R141.22, arrears is R22.20. Please use Ref 41609753 when making payment.

www.SMSsouthafrica.co.za
sales@SMSsouthafrica.co.za
011 – 568 2370                                                                                                           Page | 8
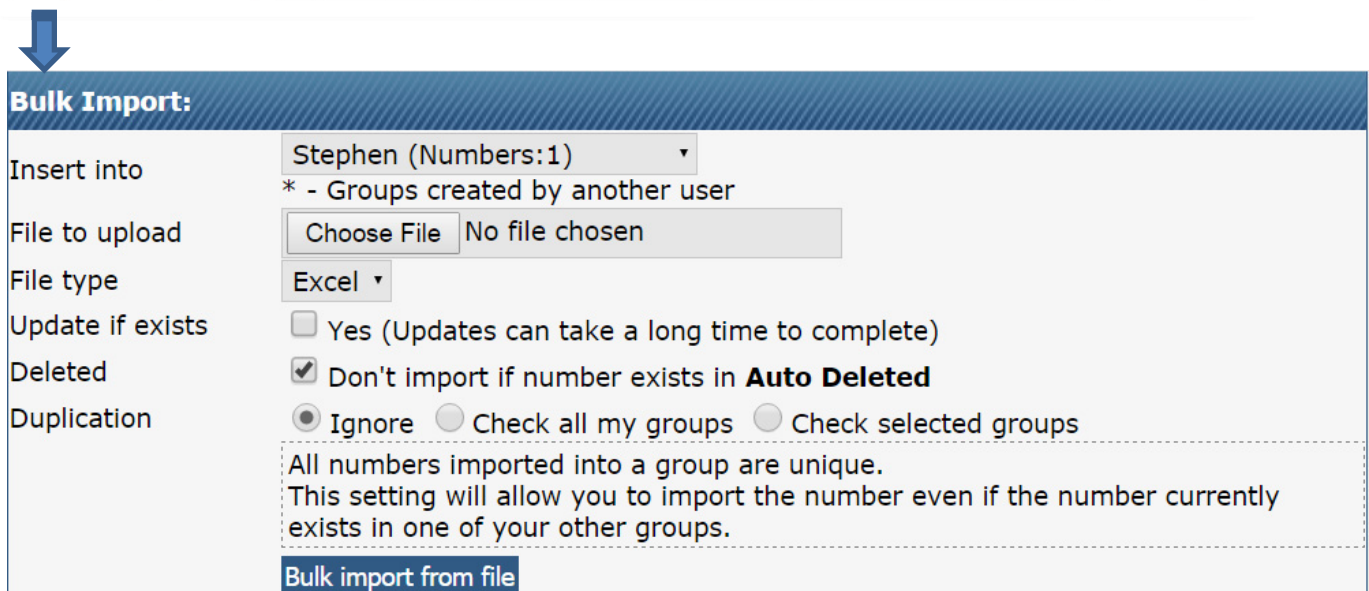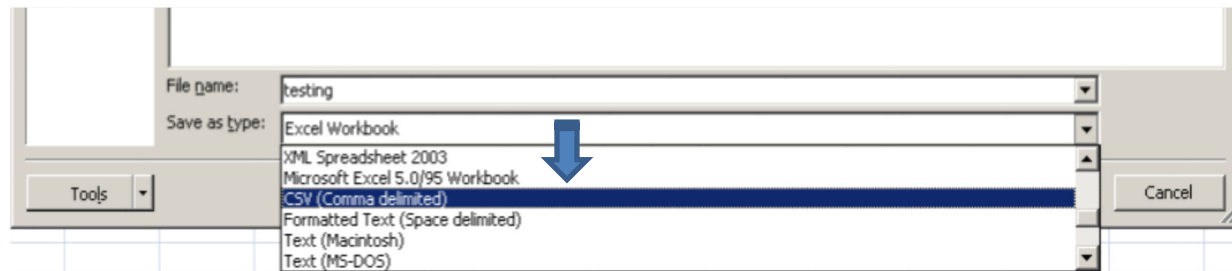
## 7.3    Save your excel file as a CSV (comma delimited) file

1.  In the Excel file go to **File** and then click on **Save As**

2.  At the bottom of the pop up window, File Name: rename your file (optional) and then beside **Save as Type: select CSV (comma delimited)**

## 7.4    How to import from a file

Once the data has been set up in one of the above formats it can be imported.



1.  Select **Group** to which data must be imported. If there is data already in the group, the new data will only be added. (It will not overwrite your current data in the group)
2.  **Browse** for the file you want to import.  Double click it when you have found it, then the window will close.
3.  Select the **file type** you wish to import.  **Select Excel, CSV or Text**.
4.  **Duplication** – **SMSsouthafrica** automatically does not let you import a duplicate number into the same group
    a)  **Ignore -**  Use this if you **don't want to check** to see if the mobile number **is in other groups**
    b)  **Check all my groups** – Use this if you want to check to see if the mobile number is in **any other groups**
    c)  **Check selected groups** – Use this if you want to check to see if the mobile number is in **certain groups**
5.  Click **Bulk Import from File**
6.  The task is finished when it says **Upload and import complete**

www.SMSsouthafrica.co.za
sales@SMSsouthafrica.co.za
011 – 568 2370                                                                                                          Page | 9

7. **Updated** – cell numbers were already in the file and any new values in the imported file were added to the correct cell number
8. **Errors** - counts the number of wrong mobile numbers (these are not imported) or any place where there was no cell number
9. **Duplicates** are counted – they are not imported
10. **Opt outs** are counted – they are not imported, these people have requested to be removed

# 8    Maintain Numbers

## 8.1   View numbers in group

1. Select the group desired or leave to default to all groups
2. Enter **search criteria (add 27 in front of the cell number) or leave blank** to give all numbers or all numbers in a selected group
3. Select '**DISPLAY**' if you want **to display the values** you added in when loading you data, e.g. Value1 could be the client name, this will assist you to identify the number
4. **Sort** numbers by **Number** or **Value** and Ascending (**ASC**) or Descending (**DESC**)
5. Choose **Set Size** – 20, 50 or 100 numbers viewed per page
6. Numbers are listed below the Search Filter area

**Edit Numbers:**  Each number can be edited by clicking '**EDIT**' next to the relevant number.
**Delete Numbers:**  Numbers can be deleted individually.   Select and click **delete selected**.
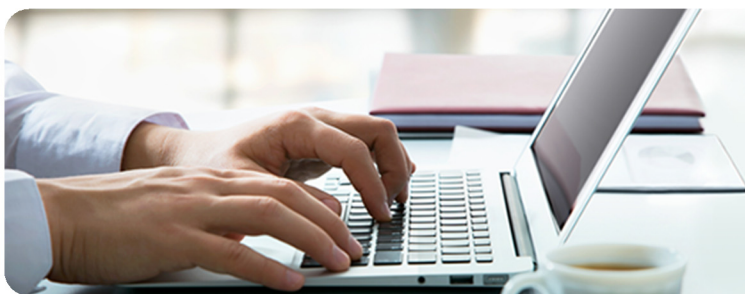**Send SMS to selected numbers:**  You can send SMS to selected numbers or all numbers.
There is a '**SELECT ALL**' or '**NONE**' function to assist in working with your data.

## 8.2   Move/copy numbers in group

1. **Select numbers** to move/copy from a group. Click **Move/Copy Selected**
2. Select **Action** (Move or Copy) and group
3. **Update** or **ignore** the contact if it exists in group
4. Click on **Copy/Move data**

**Note:  Important!**  The size of your sets can be set to 20, 50 or 100.   This is to assist when sending selected SMS. **Once you go to the next set the previous set selections are deleted.**  It is important to **select one page then send your SMS**.  Going to the next set will not carry over your selection.



Send & Receive SMS / Text from your PC

www.SMSsouthafrica.co.za
sales@SMSsouthafrica.co.za
011 – 568 2370                                                                                                    Page | 10

# 9    To Send Single SMS

1. Go to **Single Message**
2. Set the **date and time**.  If left at default, SMS will be sent upon clicking '**Send Messages!**'
3. Beside "**TO**" Enter Mobile number
4. Enter message beside **Message**.  Maximum of 160 characters.  Add **template**, if you have created one (see **How to create a template**).
5. Use **Tag SMS** if you have more to write, also maximum of 160 characters (costs 1 credit)
6. **Replies:**      **Forward to mobile**:  Enter cell number you want replies to go to (cost 1 credit)

    **Forward to Email**:  Enter email you want replies to go to (free).

    **Send Response**:  To send an automated response to the reply, fill in the text area.
7. **Flash message** – The SMS only flashes and immediately opens on the cell phone.  It is not saved in their inbox (cost 1 credit).
8. **Campaign name** – You can group messages under a Campaign Name to organize them
9. Click on **Preview SMS**. Preview of message is shown. Click **Send Messages**! Or click Close to edit the message.



A great option for you
to **mobilize your business !**

www.SMSsouthafrica.co.za
sales@SMSsouthafrica.co.za
011 – 568 2370                                                                                                        Page | 11

# 10   To Send Bulk SMS

1. Go to **Bulk Message**
2. At the top of the page **Tick the box** beside the correct group or groups
   (You can view groups from your Subaccounts to if they have selected the Read/Write option)
3. Select the **Time:  Send Now, Send Later**, or **Send Between**
4. **Send Between:**  Use this option for sending a large volume of messages that request the person to call a number. A few text messages are sent out every minute over a period of time thus regulating incoming calls.
5. Type your message beside **Message:**
   **3 OPTIONS**
   a) You can type a message that is the same for everyone **or**
   b) Select the **Template** you've already created **or**
   c) Create a Template by using the **Placeholder Values (see How to create a Template)**
6. **Replies:**
   a) **Forward to mobile**:  Enter cell number you want replies to go to (cost 1 credit)
   b) **Forward to Email**:  Enter email you want replies to go to (free).  Replies automatically go to SMSsouthafrica too.
   c) **Send Response**:  To send an automated response to the reply, fill in the text area.
7. **Flash message** – The SMS only flashes and immediately opens on the cell phone. It is not saved in their inbox (cost 1 credit).
8. **Campaign name** - You can group messages under a Campaign Name to organize them
9. **Click on Preview SMS.** Preview of message is shown. Click **Send Messages**! Or click **Close** to edit the message.

**Keeping it simple, making it easy!!!**
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**Bulk SMS Solutions**

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011 – 568 2370                                                                                                        Page | 12

# 11 SMS Template

This is a powerful feature for routine SMS's sent. Set up SMS content here and save it.  Once you go to **Single SMS** or **Bulk SMS menus** there is a **drop down menu** from which you can select an **SMS Template**, do some minor editing if required and send.  You will need to import other information in Columns B – G to use the Placeholders.

# 12 Sent/Queued

View the results of the SMS's you've sent.  Select the **Date** the message was sent, select the **Campaign name** (if needed), Tick off **Include groups in Reports** to see groups that were sent to.

Click on **EXPAND** then click on **ALL** beside **VIEW** or **Download**.  Status "**Delivered**" means it was successfully delivered to the Networks.

**How to Cancel Messages**

Click on **Pause Messages** besides W**aiting to be Processed**

Then click on **Cancel** (or release to send the messages)



# 13 Replies

1. All replies automatically get stored within your account, and can be retrieved.
2. Search for Replies based on **Date**, **All, Read or Unread Replies**.  You can also search by **Campaign Name, From Number, and by Words**.
3. To easily identify the sender include Values 1 to 6 by clicking '**Include Sent detail'**, and click '**Search**'.  The SMS receiver has **7 days to reply**.
4. **Blacklist Selected:**  You can directly blacklist cell numbers based on their replies from this page.
5. **Download Replies:**  Sort and download your replies.

www.SMSsouthafrica.co.za
sales@SMSsouthafrica.co.za
011 – 568 2370

Page | 13

# 14    Blacklist/Auto Delete

Numbers are **automatically added** to your blacklist if a person replies to your Bulk SMS with **STOP, REMOVE, UNSUBSCRIBE, or other similar words and swear words**.

You can search for blacklisted numbers by cell number *(add 27 in front of cell number)*, Campaign, date, and containing word.

You can manually add numbers to the auto delete list by one at a time or in bulk.  **These numbers will be deleted** and should the same number be imported again it will be deleted again on importing.

# 15    Sub-Accounts

1.  **Sub-Accounts:**  Create an account for another user and transfer credits to them.  Give them a Username, Password and Full name and then click on **Create Sub-Account**.
2.  **Edit Sub-Account** - Click on **EDIT** on the relevant line. Change Password, Full name, activated or deactivate the sub account and change Time Difference.  Allocate credits to the sub-account (see below).
3.  **Sub-Account Credit Allocation:**  Allocate the credits to the sub-account.  Enter number of credits beside **Amount**.  Add your own **Note** for your reference (optional).   **Click on Update Credits.  Note:**  check the primary credit stock before allocation of credit to see if there is enough credits available.
4.  **Require Authorization**:   Check this function if any messages that the sub-account sends will first need to be authorized by the main account.  These are viewed in **Sub-Accounts (Holding)** on the menu.  Then release or cancel the message. These messages can be sent to your cell phone (costs 1 credit) or to your email address (free).
5.  **Maintain Groups:**  When creating groups, you have a choice to **make the group available to a sub account holder as Read Only or Write**.  The Sub-Account holder can also create groups and make them Read or Write for the Main account.

# 16    BDay – Groups, BDay – Import

**Birthday Messages**: Birthday Messages are sent to your contacts automatically.  All you need to do is create a group, add a message, select a sending time and import your information.   When importing your data from an Excel spreadsheet, the cell number should be in Column A, Day in Column B, Month (numerical) in Column C, and Column D may contain their name (optional).

# 17 Logout

**To leave** your "session" click **Logout** so no-one can access your data or send SMS's once you have left your PC.

# 18 API [Developers]

Our API's offer you the ability to integrate via a range of simple, flexible API connections. You have a choice of 5 different connection options. They are quick and easy to implement and are suited to a wide spectrum of usage. We currently support 5 different integration methods:

1. HTTP Post/Get
2. Web Services
3. FTP
4. Windows Service + SQL Database
5. SMPP

To view detailed information on any of the above API's, please visit
www.mymobileapi.com

www.SMSsouthafrica.co.za
sales@SMSsouthafrica.co.za
011 – 568 2370                                                                                                  Page | 15