SMSPORTAL

User Manual

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1 Login

Login with your Username and Password at www.smsportal.co.za. The Number of credits in your account are in the bottom left corner.

2 Account Settings

You can change the following information here:

1. **Change your password:**
Enter the new password in the designated Password and Confirm Password box. Click "Update Account". (A Username cannot be changed).

2. **Contact Information:**
Name, email and contact details.

3. **Time Difference:**
International accounts, are able to apply/adjust the relevant time difference.

4. **Low Credit Warning and Reporting:**
Remove or change the amount at which Low Credit Warnings and Summary Reports are sent at, as well as the email they are delivered to.

5. **Forward replies to mobile or email:**
Incoming messages, or replies, from sent SMS's can be forwarded to a specified mobile number (cost of 1 credit per reply) OR a specified email address (no cost).

6. **Send response to reply:**
Set an automatic response to all received replies (1 credit deducted per response)

7. **Forward data to URL:**
Sent messages and replies can be forwarded to a website. Technical support is available to assist in the setup of this.

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Your account details:

Username	James
Password	
Confirm Password	
Name	James Pearce
Company	SMSPortal
Contact 1	0832297941
Contact 2	
Email	james@smsportal.co.za
Country of residence	South Africa (ZAF)
Credits	839822
Account created	18/May/2009 20:37
Number Prefix allowed	27
Route	ZA
Current Server time	04/Aug/2014 13:12
Time difference (minutes)	0
Your account time	**04/Aug/2014 13:12**

Low Credit Warning:

Email	james@smsportal.co.za
Email when credits reach	5000

"Opt Out" Email Notification:

Receive email when "opt out" received	☐ True
Email	

Opt Out Confirmation:

Custom Opt Out Message	1234

Reporting:

Email	james@smsportal.co.za
Daily	☑ Yes
Weekly	☑ Yes

Cost Centre Default:

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

[Update Account]

3   Online Payments

The fastest way to add credits to an account is via "Online Payments" using a credit or debit card. This is a totally secure website transaction.

• Enter "Number of Credits to buy" in the designated box.
• Click "Continue to payment page" and proceed as directed.

EXAMPLE

500 credits will be charged at 0.29c per SMS credit, excl. VAT.

1 credit = 1 SMS

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4   Maintain Groups

It is important to start here by creating the number of required groups, more groups can be added at any time. Groups allow for the storage and easy retrieval of contact information.

Example: Friends, Customers, Sales Team etc.

1. Enter the desired "Group name" and "Group description". Both fields are compulsory.

2. Sub-Accounts:
Allow for the sharing of a specific group with another user, permitting Sub-Account holders to send SMS's as well. Sub-Account holders can hold either "Read" access, or "Write" status, which allows them to write SMS's.

(See Sub-Accounts for more info)

3. Click "Create Group" (The group has now been created

4. Created groups are displayed below.
• The displayed group summary contains the name of the group, the description of the group and the number of contacts in the group.
• "Numbers" displays the total number of mobile phone numbers in the group.

5. Group Name, Description, and Sub-Accounts can also be edited. Simply Click "Edit" of the relevant group.

6. Share Group with Sub-Accounts: Sub-Accounts with "Read" status are able to view but not edit the group, while Sub-Account holders with "Write" status are able to edit the group.

7. Deleting Groups:
Click the box above "Edit" of the relevant group. Click "Delete Selected".

8. Exporting groups to Excel:
Click "Download".

9. Viewing Main Account groups is only possible if Sub-Accounts have been allocated "Read" or "Write" status.

Insert Single Number:

Insert into   andre (Numbers:0) ▼
                   * - Groups created by another user

Number   [   ]

Value 1   [   ]

Value 2   [   ]

Value 3   [   ]

Value 4   [   ]

Value 5   [   ]

Value 6   [   ]

Update if exists   ☐ Yes

Deleted   ☑ Don't import if number exists in Auto Deleted

Duplication   ⦿ Ignore ○ Check all my groups ○ Check selected groups

All numbers imported into a group are unique.
This setting will allow you to import the number even if the number currently exists in
one of your other groups.

Import single number

Bulk Import:

Insert into   andre (Numbers:0) ▼
                   * - Groups created by another user

File to upload   [Choose file] No file chosen

File type   Excel ▼

Update if exists   ☐ Yes (Updates can take a long time to complete)

Deleted   ☑ Don't import if number exists in Auto Deleted

Duplication   ⦿ Ignore ○ Check all my groups ○ Check selected groups

All numbers imported into a group are unique.
This setting will allow you to import the number even if the number currently exists in
one of your other groups.

Bulk import from file

5   Import Numbers

INSERT SINGLE NUMBER

1. "Insert into":
Select the group into which the single number must be added.

2. Enter mobile number into designated "Number" box.

3. *Optional:*
Enter Value 1 – Value 6 (Column B to Column G in the Excel Spreadsheet) if additional information is required. (See Bulk Import, for more on Values)

4. Update if exists:
Will update an existing mobile number with new values/information.

5. Duplication:
SMSPortal will automatically delete any number that is duplicated in the same group when importing data.

- **"Ignore"**
Select if it is unnecessary to verify that a mobile number appears in other groups.

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- **"Check all my groups"**
  To determine if a mobile number appears in any other groups
- **"Check selected groups"**
  Search for a mobile phone number within selected groups.

6. "Deleted"
If selected, mobile numbers will not be imported if it appears on the Auto Delete list (see Blacklist/Auto Delete)

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:

- Open a new Excel workbook
- Ensure your data is captured on sheet 1 of the workbook and not on any other sheet(s)
- Remove all headings and other sheets that might contain data
- All mobile numbers must be entered in column A, starting in row 1 with the first number in cell A1
- Columns B to G are used to store information that allows for personalisation of messages – the fields are alphanumeric and can be used for either alpha, numeric or a combination of alpha and numeric
- Number formats allowed are 0831234567, 831234567, 27831234567, or "27831234567"
- 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	B	C	D	E	F	G
1	COLUMN A (Phone Numbers)	COLUMN B (value1)	COLUMN C (value2)	COLUMN D (value3)	COLUMN E (value4)	COLUMN F (value5)	COLUMN G (value6)
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.

SAVE YOUR EXCEL FILE AS A CSV (COMMA DELIMITED) FILE:

1. In the Excel file containing the contact information, select "File" and "Save As".
2. "File Name"; rename the file (optional), under "Save as Type": select CSV (comma delimited).

TEXT DOWNLOAD FORMATS:

Data can also be imported by means of NotePad, found under Accessories in Microsoft.

1. Mobile numbers must be entered as the first field in the file. Mobile numbers can be written as 0831234567, 27081234567, 831234567, or "27831234567"
2. Separate the data columns with commas. Up to 7 separated data fields separated by commas are allowed.

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 a Group to which data must be imported. If the group contains data, the new data will only be added. (It will not overwrite the group's current data).

2. Browse for the relevant file to import. Double click this file and the window will close.

3. Select the "File type" you wish to import. Select Excel, CSV or Text.

4. Duplication: SMSPortal will automatically delete any number that is duplicated in the same group when importing data.
- **"Ignore":**
Click this if it is unnecessary to verify that a mobile phone number appears in other groups.
- **"Check all my groups":**
This will determine if a mobile phone number appears in any other groups.
- "**Check selected groups**":
This will search for a mobile phone number within selected groups.

5. Click "Bulk Import from File".

6. "Upload and import complete" will pop up when the task is complete.

7. Imported: Total amount of mobile numbers imported into the group.

8. Updated: Any new values imported into a group pertaining to an existing mobile number will see the new values added to the existing mobile number entry, instead of creating a duplicate entry within the group.

9. Errors: The amount of incorrect mobile numbers or any entry where no mobile number is available. These are not imported.

10. Duplicates are counted but not imported.

11. Opt outs are counted but not imported. This refers to individuals who have requested their mobile numbers be removed from all databases.

Home Page	Create Message Template:						
Account Settings		Value1	Value2	Value3	Value4	Value5	Value6
Online Payments							
Maintain Groups	Template						
Maintain Numbers	Preview						
Import Data	Characters Used						
Single Message		Create Template					
Bulk Message							
SMS Templates	**Template**						
Reply Routing	hi @@value1@@, pleasy pay @@value2@@						☐
Replies	this is a new template						☐
BDay - Groups	This is a template test						☐
	this is a template!						☐
						Delete Selected	

6 Maintain Numbers

VIEW NUMBERS IN GROUP:

1. Select a specific group or leave to default to all groups.

2. Enter the desired mobile number as the search criteria of the "Search Filter" (add 27 in front of the mobile number), click "Search Data" and all the available information will be provided. Or leave the search criteria blank to view all numbers or all numbers in a selected group.

3. *Select `DISPLAY` to view all values added when importing data.*

4. Sort: Entries can be sorted by Number or Value, in Ascending (ASC) or Descending (DESC) order.

5. Set Size: Determines the amount of entries displayed per page (20, 50 or 100).

6. Entries are listed below the Search Filter area.

EXAMPLE

Value1 could hold the client name and assist in identifying the mobile number.

EDIT NUMBERS:
Each contact can be edited individually, by clicking "EDIT" next to the relevant number.

Delete Numbers:
Contacts can be deleted individually. Simply select the relevant number and click "Delete selected".

Send SMS's to selected numbers:
The 'SELECT ALL' or 'NONE' function will assist users in working with data and identifying individuals to contact.

Move/Copy numbers in a group:

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

7   Send single SMS

TO SEND A SINGLE SMS:

1. Go to "Single Message".

2. Set the date and time. If left at default, the SMS will be sent upon clicking 'Send Messages'!

3. Enter the mobile number in the designated "TO" box.

4. Enter the message in the designated "MESSAGE:" box. 1 SMS consists of 160 characters (1 credit) while 459 characters are the maximum available per message sent (This translates to 3 SMS's = 3 credits). Or add a previously created template. (See Create SMS Templates).

5. Replies
• Forward to mobile
Enter the mobile number to which replies should be directed (cost = 1 credit per reply)

• Forward to Email
Enter the email address to which replies should be forwarded. (No Cost). Replies are automatically forwarded to SMSPortal as well.

• Send Response
To send an automatic response to all replies, type the necessary text in the designated text area. (1 credit deducted per response)

6. Campaign name
Messages can be grouped under a "Campaign Name" for easier filing and reporting.

7. To send a complete SMS, click "Preview SMS" to view the final message. Click "Send Messages" to release SMS's or "Close" to edit the message further.

8 Send bulk SMS

TO SEND A BULK SMS:

1. Go to "Bulk Message".

2. Select the relevant Group or Groups. (Groups can also be selected from Sub-Accounts, if Read/Write status has been assigned)

3. Time:
(Select Send Now. Send Later. or Send Between)

- **Send Now:**
  The message will be sent as soon as "Send Message" is selected.

- **Send Later:**
  Provides the option to send a message on any date at any time. Identify both the date and time the message should be sent in the space provided.

- **Send Between:**
  Useful when sending a large volume of messages which invite the receiver to make contact with the sender. Staggering the outgoing messages helps regulate the incoming calls in response to the message.

4. Type the message in the designated "Message" box. 1 SMS consists of up to 160 characters (1 credit), 2 SMS's consits of 161 to 306 characters (2 credits), with a maximum of 459 characters available per message, which translates into 3 SMS's or 3 credits.

5. Replies:

- **Forward to mobile:**
  Enter the mobile number to which replies should be directed
  (cost = 1 credit per reply)

- **Forward to Email:**
  Enter the email address to which replies should be forwarded. (No Cost). Replies are automatically forwarded to SMSPortal as well.

- **Send Response:**
  To send an automatic response to all replies, type the preferred reply in the designated text area. (1 credit deducted per response)

6. Flash message:
The SMS will immediately open on the mobile phone. It is not saved to the inbox. (Cost = 1 credit).

7. Campaign name: Messages can be grouped under a "Campaign Name" for easier filing and reporting.

8. To send a complete SMS. Click "Preview SMS" to view the final message. Click "Send Messages" to release SMS's or click "Close" to edit the message further.

3 OPTIONS

- A. Type a message that will be identical when sent to all contacts or;
- B. Select a Template created prior to sending or;
- C. Create a Template using the Placeholder Values. (See Create SMS Templates)

9   Create SMS Templates

This is a useful feature for sending routine SMS's. Set up SMS content in "SMS Templates" and save. A Template drop down menu will be available on both the Single SMS and Bulk SMS pages, from which the appropriate Template can be selected, adapted and sent. If preferred, personalised information can be inserted into the message by making use of Placeholders. Placeholders insert the imported information from Column B (Value 1) to Column G (Value 6).

Placeholders:

Value 1 = Column B	Value 4 = Column E
Value 2 = Column C	Value 5 = Column F
Value 3 = Column D	Value 6 = Column G

	A	B	C	D
1	021 234 5678	Peter	Smith	R 300
2	022 345 6789	Johan	Black	R 400
3				
4				

HOW TO CREATE A TEMPLATE USING THE ABOVE IMPORTED EXCEL VALUES:

1. Go to "SMS Templates" on the main menu

2. Type your message in the "Template" block using the personalised value fields in the message content where required

3. Click on the "Create Template" button once you have completed typing the message

Example of template message based on above data:

Dear @@value1@@ @@value2@@ your current balance is @@value3@@.

Outcome:

Dear Peter Smith your current balance is R300.
Dear Johan Black your current balance is R400.

10   Sent / Queued

The results of sent SMS's can be viewed on this page. Simply select the Date the message was sent, select the Campaign name (if applicable), Select "Include groups in Reports" to view the groups that were sent to.

Click "EXPAND", a list of options will appear. Select either "View" or "Download Excel 2007" alongside the relevant item on the list.

- Status "**DELIVERED**":
Successfully delivered to the Networks.

- Status "**UNKNOWN**":
The contact is listed under an unknown number, not recognised by the networks.

- Status "**EXPIRED**":
In 24 hours the system was unable to deliver a SMS due to connection problems or a mobile phone that has been switched off.

- Status "**UNDELIVRD**":
Message was not delivered.

- **Replies**:
Displays all messages returned on sent SMS's.

- **Opt outs**:
Lists any contacts who have replied "stop", "no" or "delete" to a sent SMS, choosing not to receive any further messages.

Cancel Messages:

• While SMS's are waiting to be processed click "Pause Messages".
• Click "Cancel" to delete SMS's (or click "Release" to send the paused SMS's)

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11   Number Lookup

This tool allows for a search of individual mobile numbers and their SMS history. Select the relevant date range, enter the required mobile number and click "Generate report". A report containing all SMS's previously sent to this number will be displayed in an Excel document.

12   Replies

All replies are automatically stored under this menu option. Replies can be sorted by Date, All, Read or Unread replies. Other search criteria include Campaign name, From number, and specific Words. To easily identify the sender include Values 1 to 6 by clicking "Include Sent detail", and click "Search". Once the SMS has been delivered, the receiver has 7 days to reply.

Blacklist Selected:

Mobile numbers can be directly blacklisted from this page, based on their replies.

Download Replies:

Sort and download replies.

13   Blacklist / Auto Delete

Numbers are automatically added to a blacklist if a contact replies with STOP, REMOVE, UNSUBSCRIBE, or other similar words or swear words to any SMS.

To search blacklisted contacts enter the mobile number (add 27 in front of mobile number), Campaign name, date, or message content. Contacts can manually be added to the Auto Delete list individually or in bulk. These numbers will be deleted from the database. Should the same number be imported in future it will automatically be deleted.

14   Sub-Accounts

Sub-Accounts:
Create an account for another user and allocate the necessary credits from the Primary account. Provide the full name of the Sub-Account holder and assign a Username and Password and click Create Sub-Account.

Sub-Account Credit Allocation:
To allocate credits to a Sub-Account enter the number of credits in the designated "Amount" box. Add a Note for reference purposes (optional) and click "Update Credits".

Edit Sub-Account:
Click "EDIT" on the relevant Sub-Account listing to change the Password, Full name or Time Difference, as well as to activated or deactivate the Sub-Account.

NOTE | Confirm available credits on Primary account credit stock before allocating credit.

Require Authorisation:
Apply this function to ensure messages composed by a Sub-Account are authorised by the Primary account before being released. These messages can be viewed in Sub-Accounts (Holding) on the menu, and action taken to "Release" or "Decline" SMS's.

Maintain Groups:
When creating a group, the option exists to make the group available to a Sub-Account holder as "Read Only" or "Write". The Sub-Account holder is also able to create groups and allocate "Read Only" or "Write" status to the Primary account holder.

15   BDay Groups / BDay Import

BIRTHDAY MESSAGES:

Sent to contacts automatically. A short User Guide is available upon request.

Creating a birthday group:

1. Select "BDay group" from the menu bar

2. Enter a group name and group description.

3. Type the desired message in the designated "Group Message" box.

4. Select the preferred time for the SMS to be sent out each day.

5. To receive replies, enter the mobile to which replies should be directed.
(Cost = 1 credit per reply)

6. Select "Create group".

SETTING UP DATA IN EXCEL SHEET:

Birthday data must be imported in the following order:

Column A: Mobile number.
Column B: Date of birth.
Column C: The numerical value of the month of birth.

See diagram below.

	A	B	C	D	E
1	Number	Day	Month	Value1	Value2
2	27823456789	6	12	Mr	Van Zyl
3	27834567865	15	12	Miss	Goosen
4					
5					

Save the file, once all the necessary data has been included. Import the birthday data into the already created group. To Import data select "B'Day – Import Data" followed by "Select Bulk Import", a new screen will appear (see right) and complete the required fields.

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Any additional information can be added in the columns that follow (Address or email address).

Save the file, once all the necessary data has been included. Import the birthday data into the already created group. To Import data select "B'Day – Import Data" followed by "Select Bulk Import", a new screen will appear (see below) and complete the required fields.

Insert into: Select the newly created birthday group.

File to upload: Browse for and select the birthday data excel sheet.

File type: Select the File type the data is saved as (CSV or Excel).

Select "Bulk Import from file".

All data will now be imported into the selected group.

1. An "Upload and import complete" message will appear when the task is complete.

2. Imported:
The total amount of mobile numbers imported into the group.

3. Updated:
The number of contacts previously in the group, which received new values/ information when importing the new data file.

4. Errors:
Identifies the number of incorrect mobile numbers. These are not imported and any row that does not contain a mobile number.

5. Duplicates:
These entries are counted but not imported

6. Opt outs:
Contacts which have requested to be removed from all databases are counted but not imported.

16   Logout

To leave a "session" click "logout", to prevent unauthorised persons from accessing account data or sending unauthorised SMS's.