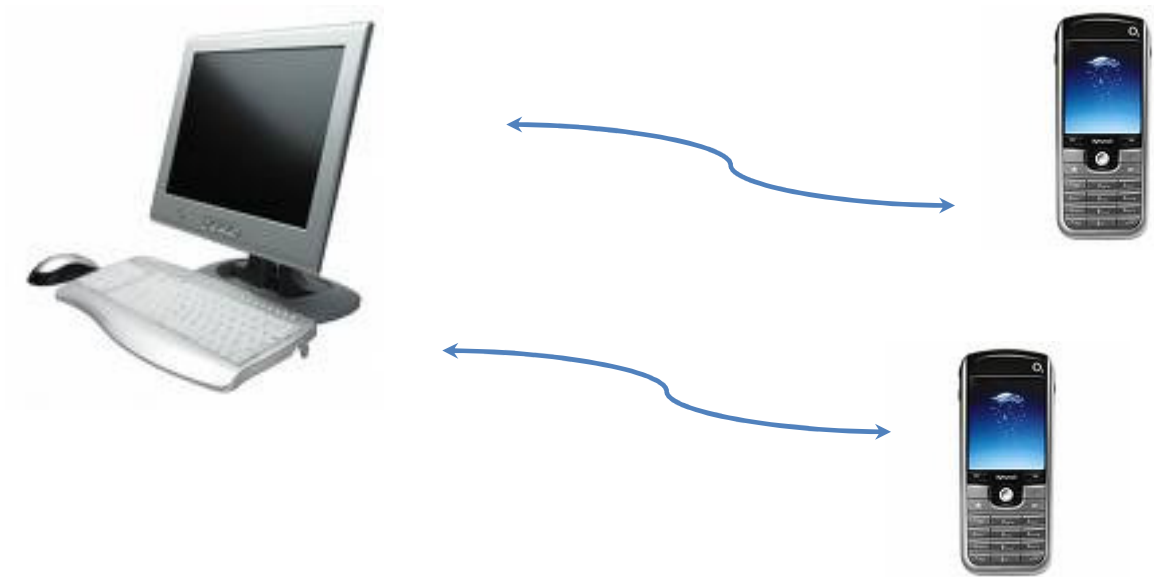




www.thesmsengine.com

Windows User Guide



COMMUNICATION MADE EASY

The SMS Engine for Windows – User Guide

First Edition published April 2007

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Privacy Statement

The SMS Engine for Windows comprises multiple databases that can contain personal details about individuals, including name and mobile telephone number. It is important that users maintain the private nature of this data at all times and only allow access to authorised staff. The DEVELOPER has no access to data stored in this software. The SMS Service Providers, thesmsengine.com maintain a separate privacy policy available on request. thesmsengine.com is committed to ensuring all data is kept private and secure and will not pass on any data to other parties for purposes other than providing its specified service.

How to Get User Support for The SMS Engine for Windows:

If you have encountered a problem with using The SMS Engine for Windows, you should first take note of exactly what you were trying to do and what messages displayed or symptoms were evident. The following resources should be used - in order - in obtaining support for the software:

<ul style="list-style-type: none"><input type="checkbox"/> This user documentation<input type="checkbox"/> http://www.thesmsengine.com/Support.cfm<input type="checkbox"/> Your local technical support provider	If there is still an unresolved problem, your local support provider should take full detail of the problem and report it to the DEVELOPER via e-mail for prompt attention.
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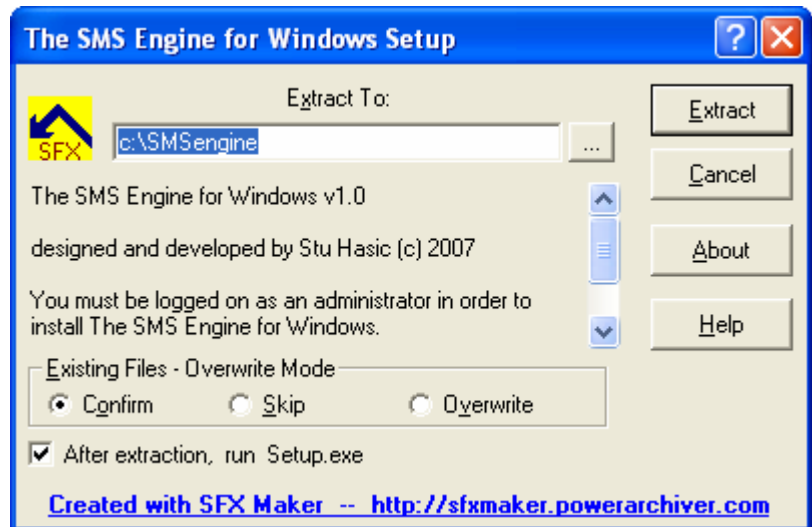
Introduction:

The SMS Engine for Windows is a very powerful yet simple to use tool for managing your organisation's SMS requirements. Working in conjunction with **thesmsengine.com**'s Internet-based SMS delivery service, this software will provide you with effective and reliable SMS communications.

First Time Installation:

1. Logon to an Internet-connected Windows PC as a **local administrator user**.
2. Open your Internet browser and download The SMS Engine Setup program from this address – <http://stuhasic.com/smsengine/smsenginesetup.exe> - Save this single installer file to your Desktop then close or minimize your browser.

3. Double-click **smsenginesetup.exe** and read the opening screen then click OK. The screen shown here will then be displayed. The default folder for installation is as shown – C:\SMSEngine. If you would like to install into a different folder, click the [...] button to the right and select or create a different folder. You can choose a folder on an available fileserver, but it is essential that any users of the software have read/write access to that folder.



4. When you have set the desired folder, click the **Extract** button.
5. Setup will extract the software and install and register necessary support files for Windows. It will also place a shortcut to *The SMS Engine for Windows* on the Desktop that looks like this:



The SMS Engine for Windows is now installed and ready to be configured. If you have installed the software to a fileserver share and would like it to be accessible on other Windows computers, you should logon to those computers as an Administrator and open the folder where the software was installed and then double-click the Setup.exe program to install and register the needed Windows support files. With a fileserver setup, *The SMS Engine for Windows* can share its databases and allow for multi-user simultaneous access.

Running the SMS Engine for Windows for the First Time:

The SMS Engine for Windows is very customisable. You can:

- Create multiple mobile phone databases and groups
- Create automatic group databases from your main database
- Import your databases in CSV (comma-separated variables) format
- Setup and use an extra custom field
- Run in General Use mode (single contacts database with multiple groups) or
- Run in School Use mode (dual-contacts database – staff/parents with multiple groups)
- Customise common-use phrases using the SMS Constructor for easy SMS building
- Customise complete common-use SMS messages – including personalised mail merge

When you run *The SMS Engine for Windows* for the first time, you will need to configure it. The software will not be able to be operated until these mandatory settings are completed. To assist with this process, the simple form on the next page can be used to gather the necessary information before you to type it in.

Prerequisites (things you *MUST* know) before you can Configure the SMS software:

- Your **Organisation or School Name**: _____
- A suitable **E-mail address** for your organisation: _____
- The address of your **SMTP (Email) Server**: _____
- **SMTP Server Username & Password** (if required): _____
- The **Phone number** you'd like SMS recipients to call you back on: _____
- Your **SMS Account Name** provided: _____
- The **Authorisation Key** provided by **thesmsengine.com**: _____

Start *The SMS Engine for Windows* by double-clicking its icon on the Desktop. After you click OK on the notification window, you will need to complete the form that is displayed. It is recommended that you utilise your local technical support person to obtain the correct options for the *E-Mail to SMS Gateway Settings* section if you are unsure. The specific details for the bottom two fields (*SMS Account Name and Authorisation Key*) should be provided to you by **thesmsengine.com**. All fields marked with an asterisk (*) are MANDATORY.

In the **User Mode** box at the bottom, if you are a school, select *School Use*. All other users should choose *General Use*.

Your Custom Field Name:

This field is also mandatory and very useful if used correctly. Before you can place a name

here, you need to understand what it is for and how it can be used. The mobile phone databases used in *The SMS Engine for Windows* contain five fields: Surname, First Name, Mobile Phone Number, Primary Group and one further Custom Field. This Custom Field is user-definable both by title and content and can be used in a variety of ways. It is probably best explained by example situation.

Your teachers are preparing for Parent-Teacher Night and they'd like to see all the parents show up. In the Parent database that's in *The SMS Engine for Windows*, you have the Student's surname and first name, but the designated parent's mobile phone number. You could have the Primary Group field set as the Class name they are in, e.g. 5F and the custom field could be the teacher's Name. Then an SMS could be sent to all parents in each class like:

I look forward to seeing you at Parent-Teacher Night on Tuesday to discuss <Fname>'s progress at school. Please phone <PHONE> to confirm. Regards, <CODE>

What each parent gets is a personalised SMS like (*<CODE> is now the Teacher's Name*):

I look forward to seeing you at Parent-Teacher Night on Tuesday to discuss Jason's progress at school. Please phone 7632-9202 to confirm. Regards, Jane Harris

As you can see, this form of communication is very targeted with an aim to gain a response. Hopefully you can also see how useful the Custom Field in the SMS Database(s) can be. Based on this background information, you should consider how you'd like to use your Custom Field. It can be changed at a future date, but must be set before you can use the software.

The SMS Constructor:

The section at the left on the *Settings and Preferences* form is optional, but very useful. It allows for up to 12 different common-use phrases to be entered. Sets of phrases are provided with the software to give you an idea of how they work. These phrases can be popped into a new SMS text with a single click of the mouse making construction of an SMS very quick. You do not have to complete all twelve phrases to save the form, but you can go back to the Settings and Preferences screen at any time to adjust the phrases used by the SMS Constructor.

Saving the Settings and Preferences:

When you have completed the form, click the **Save and Close** button to save the settings.

The SMS Engine for Windows:

Once configured, the *SMS Engine for Windows* will appear as shown below:

The above display is shown running in **School Use** Mode, so at the top, there are two databases to choose from – *Staff* and *Parents of Students*.

Selecting a Database to Use:

At the top of the form in the area titled “*Choose a Recipient Database*”, there are three options. *The Group DB (Batch Mode)* option is only available if Group databases exist and then allows you to choose the specific Group database you’d like to use from the list. The first time you run *The SMS Engine for Windows*, there won’t be any Group databases and they won’t appear until you have at least created one of the main databases.

The main database’s refers to the exporting of parental and staff contact information from the PC-School software. Once this is completed, you are in a position to create group databases. Group databases might be created for the following groups... school excursions, sporting teams, school band... P & C.

Editing the Databases:

When first setup, there are no mobile phone records in the databases and these will need to be entered before use. There are two ways that the mobile phone databases can be created:

- Manual data entry into the **Database Editor** in *The SMS Engine for Windows*
- Exporting existing data to a **CSV file** created in a spreadsheet like MS Excel.

The Databases used by The SMS Engine for Windows:

The SMS Databases all reside in the **SMSEngine\Data** folder. Every database is identical in format and contains the following five fields only:

Surname, First Name, Mobile Phone Number, Primary Group, Custom Field

When in **School Use Mode**, there are two main databases – **Staff.CSV** and **Parents.CSV**

As well as these main databases, there are multiple Group databases. These are either Auto-generated from the Primary Group field in the Main database(s) or the user has manually generated them. The Auto-generated Group databases are as follows:

- **gAllContacts.csv** – A group consisting of EVERY contact – to send in one go.
- **gAllStaff.csv** – A group to send to all staff in one go.
- **gAllParents.csv** – A group to send to all parents in one go.
- **gAllxxxxxx.csv** - (xxxxxx is the Primary Group Name). There would be one of these for each Primary Group used in the main database(s).

The Manually-generated Group databases are all named commencing with a **g** and ending with **.csv** – e.g. **gAbsences.CSV**. You can store and use up to 32,000 Group databases in *The SMS Engine for Windows*.

IMPORTANT NOTE: If you are creating databases using Excel or exporting from external databases, DO NOT include a header row in the spreadsheet, only include the data. It is also best if the file has been sorted into Alphabetical order on Surname and make sure you name the databases as described above, so they can be used by *The SMS Engine for Windows*.

Manually Entering/Editing Your Database(s):

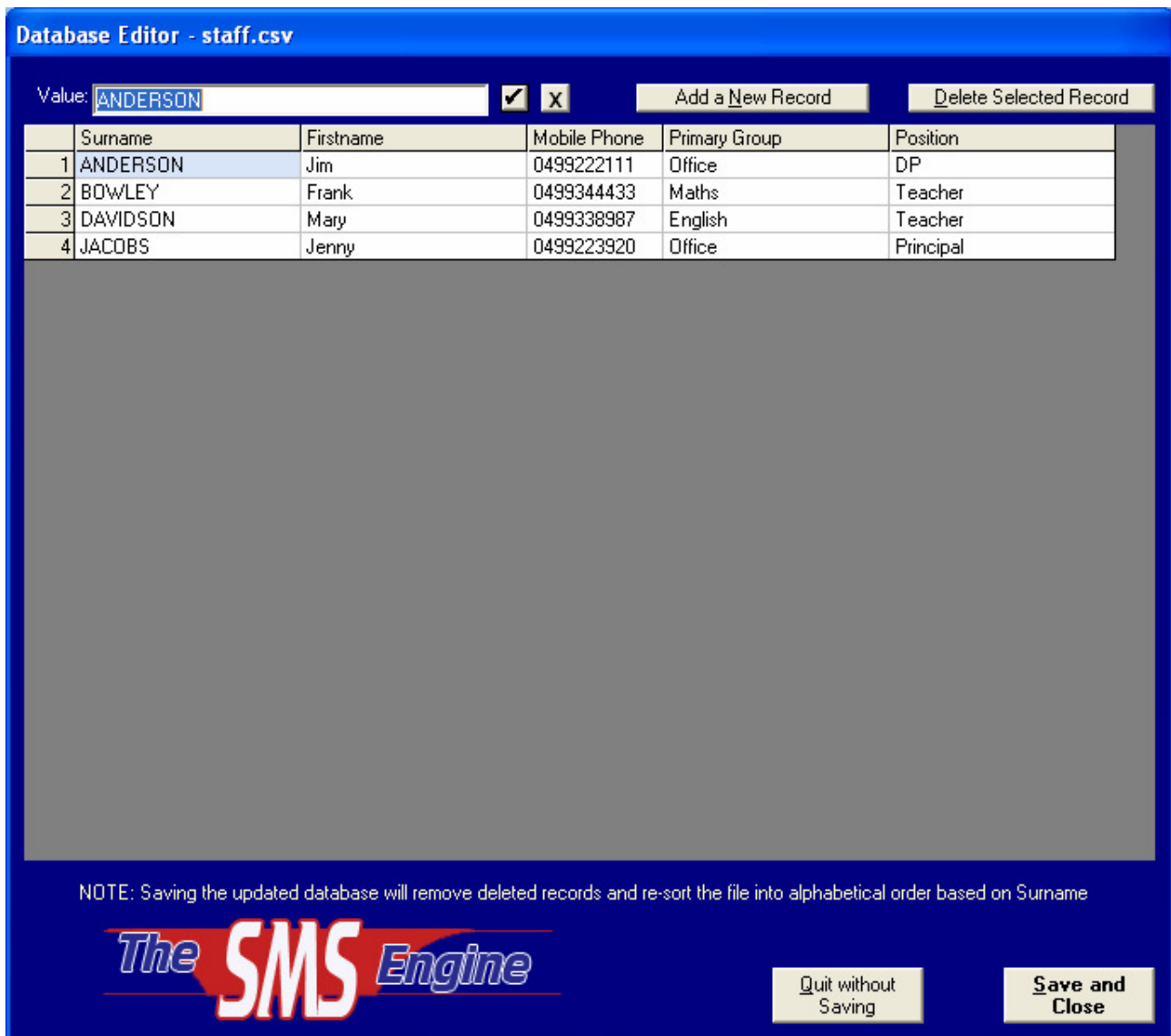
Under the **Databases** menu in *The SMS Engine for Windows*, choose the option, **Selected Database Editor...** and the screen shown on the next page will be displayed. This screen allows you to edit whatever is the currently SELECTED database. It can either be one of the Main databases, or a Group database. However, it is not possible to edit one of the Auto-generated Group Databases (*that have a name starting with "gAll..."*) as these get automatically recreated every time you start *The SMS Engine for Windows*. You can however edit any manually generated Group database by selecting it first then opening the *Selected Database Editor*.

All records in the selected database will be displayed here (*up to 2,000 records can be stored in any one database*). You can click on any field to edit the contents that show in the **Value** box at the top. Just press the *Enter* key to accept any changes you make.

To **Add** a new record to the database, just click the **Add a New Record** button at the top of the form or press **Alt-N**. A new blank record will be added to the bottom and it's a simple matter to type in the details. Pressing Enter after each entry will jump to the next field automatically.

To Delete any record from the database, first click on the Surname of the record (line) you want to delete (so it highlights in light-blue), then click the **Delete Selected Record** button or press **Alt-D**. This will change the contents of each field in that record to "DELETED".

When you have completed editing the database, click the **Save and Close** button or press **Alt-S** and the bottom of the form to clear out deleted records, re-sort the file into alphabetical order and save all entries. If you have made changes but you do not wish to save ANY of them, click the **Quit without Saving** button or press **ALT-Q**. This will restore the database to its original pre-edited form.



This *Selected Database Editor* can be used at any time to add/edit or delete records from any database quickly and easily. Furthermore, you can also open any of the CSV databases using MS Excel to edit them or to copy/paste data etc. The databases in *The SMS Engine for Windows* have been designed to be as flexible and easy to work with as possible.

Creating Your Own Group Databases Easily:

You can create a new Group database by exporting from any third-party database system you may use in your organisation into a spreadsheet like MS Excel and then format the file into a CSV format used by *The SMS Engine for Windows* as explained in the top half of page 8. Just remember to name the CSV file you create externally so that the filename starts with a "g" and ends with .CSV.

Alternatively, you can create your own Group databases using *The SMS Engine for Windows* software directly. In the software, the main database(s) in are very important, because from these databases, you can create virtually as many Group databases as you need. The starting point for any new Group database is any one of the existing databases. Simply select an existing database and from it, you can make a subset Group using any or all of the records it contains. You can also name the group however you like. To create your group, first select the database you'd like to work with, then open the Databases menu and choose **Create a New Group DB from the Selected DB**. A screen similar to the following will appear:

Create a New Group Database from parents.csv


New Group Name: A New Group Database can easily be created from any existing DB
 eg. SeniorMembers Group Filename: **gSchoolCouncil.csv**

[Double-click names to ADD them to the Group]

BUCKETT, Phillipa - 0499868526 [3J]
 CHANDLER, Gina - 0499868527 [4M]
 DAVISON, Peter - 0499868528 [3J]
 DUNCAN, Duncan - 0499868529 [6H]
 ETHAN, Ian - 0499868530 [4M]
 EWING, Stuart - 0499868531 [6H]
 FRASER, Fred - 0499868532 [3J]
 GARVIN, Anne - 0499868533 [4M]
 GILLETTE, Penn - 0499868534 [4M]
 HADLEY, Ray - 0499868535 [3J]
 HUGHES, Hugh - 0499868536 [6H]
 IRVING, Amy - 0499868537 [5K]
 JACKSON, John - 0499868538 [5K]
 JONES, Julie - 0499868539 [6H]
 KELVIN, Kevin - 0499868540 [6H]
 KILLEN, Craig - 0499868541 [4M]
 MCNAUGHT, Erin - 0499868542 [6H]
 MIDDEN, Pile - 0499868543 [3J]
 MUSTARD, Colonel - 0499868544 [4M]
 NIVEN, Richard - 0499868545 [4M]
 OGDONOR, Oscar - 0499868546 [3J]
 PATRICK, Patrick - 0499868547 [6H]
 PILSENER, Draught - 0499868548 [5K]
 QUENTIN, Ray - 0499868549 [5K]
 RUGBY, Anson - 0499868550 [6H]
 RYLES, Jason - 0499868551 [6H]
 SANDERS, Tony - 0499868552 [4M]
 STEADMAN, Steve - 0499868553 [6H]
 TERRY, Terry - 0499868554 [3J]
 UNDERCLIFFE, Susie - 0499868555 [4M]
 VALENTINE, Mia - 0499868556 [4M]
 WATSON, Joe - 0499868557 [3J]

[Double-click names to REMOVE them from the Group]

BUCKETT, Phillipa - 0499868526 [3J]:1
 DAVISON, Peter - 0499868528 [3J]:3
 GILLETTE, Penn - 0499868534 [4M]:9
 MIDDEN, Pile - 0499868543 [3J]:18
 PILSENER, Draught - 0499868548 [5K]:23
 STEADMAN, Steve - 0499868553 [6H]:28
 UNDERCLIFFE, Susie - 0499868555 [4M]:30



In this example, the Parents database was opened, and a New Group called "**SchoolCouncil**" is being created. The list of all Parents mobile numbers is shown in the window on the left and it is a simple matter of double-clicking on each School Council member's name to place them in the new group on the right (*called gSchoolCouncil.csv*). If a name is incorrectly placed in a group, it can be easily removed by double-clicking the wrongly selected record in the window on the right. When the group is complete, click the **Save as New Group and Close** button, or press **Alt-S**. If you do not wish to save the group you are creating, click the **Quit without Saving** button or press **Alt-Q**.

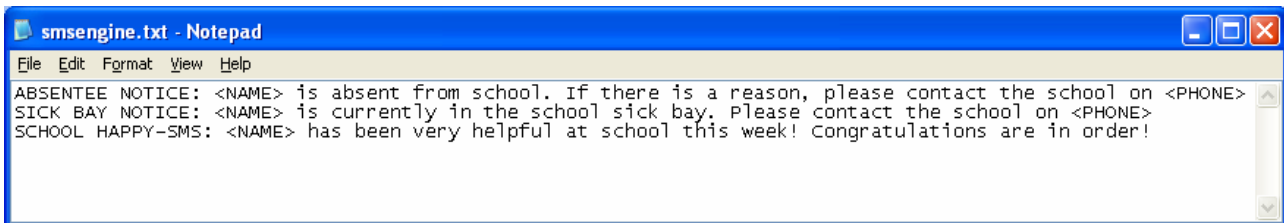
Once the new group is saved, you will be returned to the main screen of *The SMS Engine for Windows* and your new group can immediately be selected for batch sending of SMS texts.

Once you have created a new group, editing that group is managed the same way as editing any database, using the *Database Editor*, as described on pages 8 and 9.

Customising your Pre-defined SMS Messages:

Just above the *SMS Message Constructor* section on *The SMS Engine for Windows* main screen, there is a pull-down window titled "Pre-defined SMS Messages". This area can contain up to 32,000 different pre-defined messages that you can choose to send to your recipients. Furthermore, the messages can include "merge-fields" from the SMS databases to allow you to send completely unique texts to each member of your chosen Group database.

You can edit or customise the set of Pre-defined SMS Messages by opening the **File** menu and choosing **Pre-defined SMS Messages Editor (Notepad)**. Brief instructions will be displayed before the file is opened in *Notepad* for editing:



Follow the instructions above and edit your list of pre-defined messages, with one message per line. Save the file when complete and the next time you start *The SMS Engine for Windows*, your new pre-defined messages will be available to choose from.

Sending SMS Text Messages using *The SMS Engine for Windows*:

Assuming the key settings and preferences for the program as detailed on previous pages have been configured, sending SMS texts is very quick and simple. With *The SMS Engine for Windows*, you can send a *Pre-defined* message, a *Constructed* message or a *manually typed* message to:

- any single mobile phone that has been typed manually into the program
- any single mobile phone selected from one of the databases stored in the program
- all mobile phones stored in any one selected Group database

Further, the messages you send can be personalised by the use of "merge-fields". These fields are automatically filled with actual data from the database record. The merge fields are defined as follows:

- <FNAME>** - inserts the recipient's First Name - e.g. *Greg*
- <SNAME>** - inserts the recipient's Surname - e.g. *SMITH*
- <NAME>** - inserts the recipient's Full Name - e.g. *Greg SMITH*
- <PHONE>** - inserts your return phone number as set in the Preferences screen
- <CODE>** - inserts the contents of your *Custom Field* from the database record

Utilising these merge fields in your SMS texts will allow you to produce a more relevant and personalised message for each recipient.

Sending a Single SMS Message:

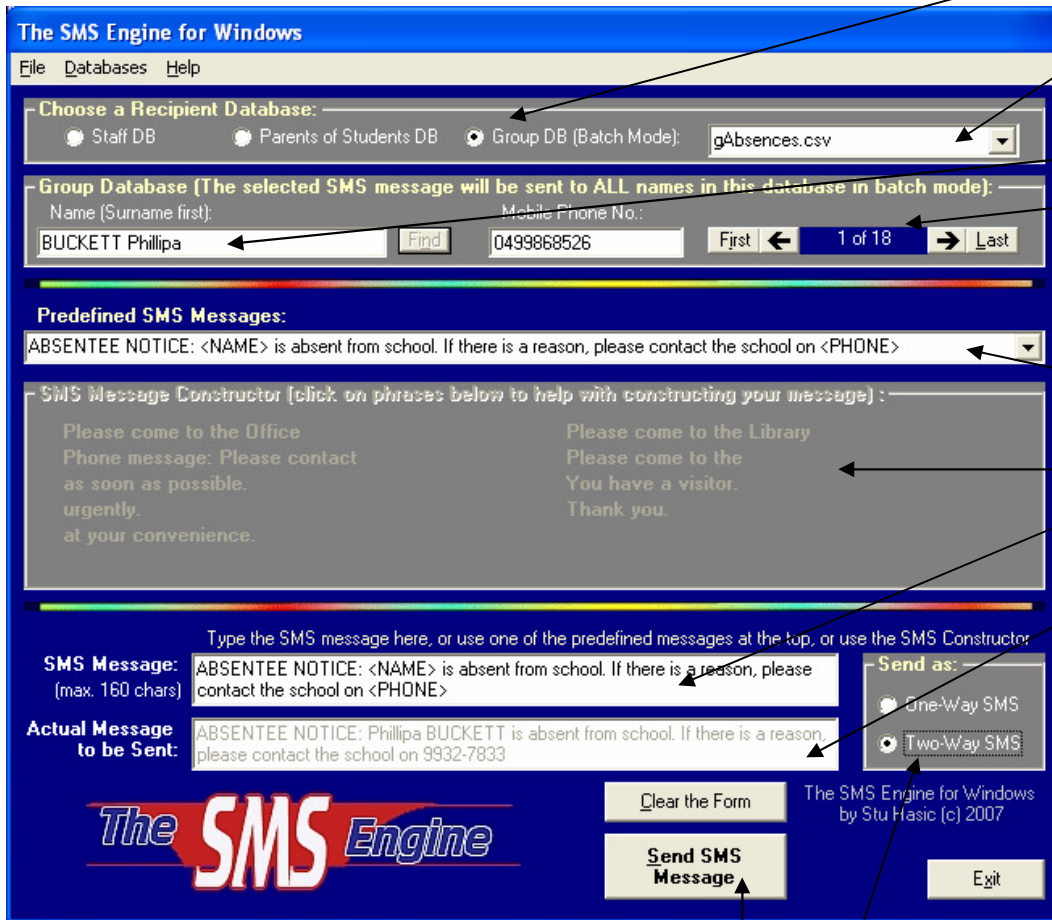
STEP 1:
If choosing a recipient from a database, select the database you'd like to use – either *Contacts*, *Staff* or *Parents*

STEP 2:
Type in part of the Surname and press **Enter** or click the **Find** button, then use the arrow buttons if you need to find the right person **OR** just type in the recipient's name and number into the boxes

STEP 3:
Select a **Pre-defined SMS Message**, or use the **Message Constructor** or **just type in** your SMS Message. NOTE the **Actual message** that will be sent

STEP 4:
Decide whether you'd like the recipient to be able to reply to the SMS (Two-way), or if it's just a straight information text you are sending that needs no reply (One-way). Then click **Send the SMS Message**

Sending Multiple SMS Messages (in Batch Mode):

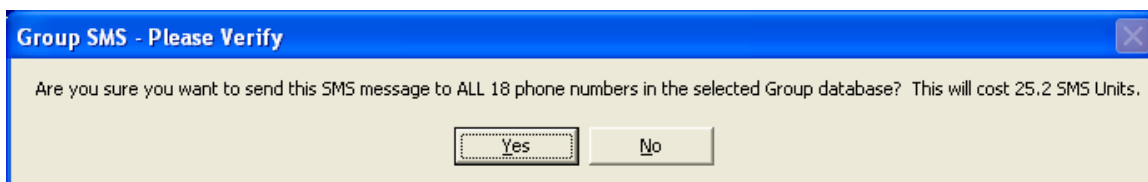


STEP 1:
Click **Group DB** and choose the actual group file from the pull-down list. Note how the first person is shown and how many are in the group

STEP 2:
Select a **Pre-defined SMS Message**, or use the **Message Constructor** or **just type in** your SMS Message. NOTE the **Actual message** that will be sent

STEP 4:
Decide whether you'd like the recipient to be able to reply to the SMS (Two-way), or if it's just a straight information text you are sending that needs no reply (One-way). Then click **Send the SMS Message**

When you click the **Send SMS Message** button, a verification box will be displayed to check if you are sure you'd like to send the message to all members of the displayed group. It will also inform you of the cost in SMS units to send this text message as specified in the form:



In this example, the SMS text is being sent to 18 mobile numbers in TWO-WAY mode, meaning the recipients will be able to reply to the text message they receive via SMS. Because a Two-way message costs 1.4 units (*a one-way text costs 1 unit*), the total cost for this SMS task will be 25.2 units. In this case, because merge-fields are used, each of the 18 people will receive a personalised, unique text message. An SMS transmission window then will be displayed showing the progress of the SMS transfer that is very quick and finally a success message will be displayed and you will be returned to the main screen of *The SMS Engine for Windows*.

NOTE: Delivery of the SMS text messages to each recipient is normally within **ONE MINUTE**. However, it must also be noted that some recipients may not have their phones on, but they will receive their text message when the phone is next turned on.

How SMS Recipients can Reply to a Text Message:

Recipients can only reply to a text message if it was sent as a TWO-WAY message. One-way messages do not display a return phone number, but two-way messages do. Replying to a *The SMS Engine for Windows* text message is the same as replying to ANY SMS text message a person may receive. They would view the message, select *Reply* and key in that reply. Then they would select *Send*. The Mobile Phone Number associated with *The SMS Engine for Windows* is the same for all users of the software and does not actually relate to any mobile phone. It relates to *The SMS Engine* website which receives all SMS replies electronically. The website automatically processes all replies it receives and identifies the Sender via the uploaded databases detailed on page 12. With that information, it can identify both the phone number and the sender's name and the correct recipient for that reply.

The reply is then packaged as an email message and sent directly to your **email** address used when registering *The SMS Engine for Windows* (should you NOT wish to receive SMS replies to your email address email us at admin@thesmsengine.com). In addition, it is sent to your **SMS Inbox** at *The SMS Engine* website. So a record can be kept regarding all replies received. Replies will be received in your inbox, normally within two minutes of their being sent.

The SMS Engine Website (Sending SMS from an Internet Browser)

The SMS Engine website is located at <http://www.thesmsengine.com>

Your Account at the SMS Engine

The SMS Engine for Windows software is an effective desktop solution for fast effective SMS communication. However, at its heart is the SMS Engine website that actually sends and receives the SMS messages. For your school the beauty of our system lies in its flexibility. You are able to send messages from any Internet browser in the world as long as you have the necessary login details. This is a very important feature given the fact that you do not need to be at your school PC to send the SMS message/s.

So we have put together some basic website functionality for your information.

Logging into the SMS Engine Website

Open browser and go to www.thesmsengine.com and enter login information here.

Sending an SMS message using the MULTI SMS page

The Multi SMS page has the Parent and Staff databases available to you, with each grade grouped individually as are the staff contacts.

By clicking the "+" sign next to the grouping a list of contacts held within that group will appear from which you can select the desired recipients.

To send a message simply:

- Click "Send Multi SMS"
- Write your message – up to 160 characters
- Select either "one-way" or "two-way".
(Remember a two-way message allows recipients to reply to the message with replies being sent to the SMS INBOX")
- Select your recipients – if you want everyone in the group tick the box next to the grouping, otherwise click the "plus" sign and it will list all recipients in the group. Click "Send SMS".

The MULTI SMS page allows you to send an SMS message to multiple recipients

Scheduling an SMS message to be sent at a particular date & time

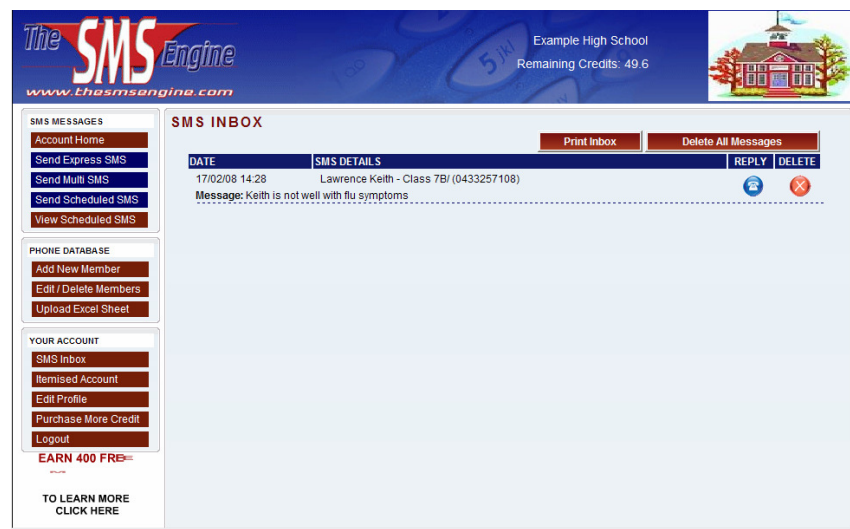
The scheduling feature is a great function to use when planning excursions or making sure people are given important reminders. It is the same as MULTI SMS except you can select at what time and date you would like for the message to be sent.

- Click "Send Scheduled SMS" on the menu bar
- Enter date by clicking the calendar icon and nominate the correct month and date required.
- Select the desired time – you can alter the time choices by clicking "CHANGE TIMES".
- Select the frequency – if this is a one-off message choose *DAILY*.
- Select the number of cycles – for a one-off message select "1".
- Type your message
- Select one-way or two-way
- Select recipients
- Click "Send SMS"

You can view your scheduled messages by clicking "VIEW SCHEDULED SMS" on the menu bar.

SMS Inbox

By selecting "SMS Inbox" in the menu bar you can view your incoming reply messages. The message display states the message as well as who sent the message.



SMS Inbox page

Your itemised account

The "Itemised Account" is one of the options in your account menu bar. The account details the type of message sent (one-way or two-way), the recipients, the message and the status of the message.

Purchasing SMS Credit

Additional SMS Credits can be obtained either by paying through our online feature (Pay Pal) or alternatively you can email us as admin@thesmsengine.com stating your school name and the number of credits you wish to purchase. We will then send to you via email an invoice. We will allocate your credit requirements immediately. We will provide 21-days credit.

IMPORTANT NOTES:

Using the SMS Engine:

- It is important to keep your SMS Account details (*username/password*) secure. With this information, anyone can send SMS texts and use your credits.
- It is the User's responsibility to ensure the mobile phone numbers in your database are accurate and current. *The SMS Engine* can only do what it is asked to do, and that is, send SMS Texts to your specified number(s). There is a charge of 1 credit for each SMS text sent for a one-way text, or 1.4 credits for a two-way text – regardless of whether the message is received by the correct person or not.
- It is the User's responsibility to ensure there are sufficient credits available in your SMS Account in order to send the desired number of text messages. You will receive "bounce" emails if you attempt to send SMS texts with no remaining credit and the text messages will not be sent.

Privacy:

- *The SMS Engine* service ensures your private data such as your account details, contact mobile phone numbers and names and SMS texts sent are held securely and will not be passed onto third parties.
- *The SMS Engine* uses https: (*secure*) protocol to ensure data transferred between your computer and the website cannot be intercepted.

Appropriate Use:

- NO UNLAWFUL OR PROHIBITED USE. By using The SMS Engine website and desktop software you agree as the user not to use the Web Site to deliver any inappropriate, profane, discriminatory, obscene, defamatory, indecent or unlawful messages. The SMS Engine is not obligated to review the SMS messages and their content sent from the site, however, we do reserve the right to terminate your access should you breach the standards stipulated above. In addition, you may not use The SMS Engine website in any such manner that could harm the information, products, services or the integrity of the website, the networks connected to the website, or any third parties' use and enjoyment of the site. You may not attempt to gain unauthorized access to the website, other accounts, computer systems or networks connected to the website by any means, including without limitation, hacking or password mining.
- Complete Terms and Conditions for the use of The SMS Engine can be found here: **<http://www.thesmsengine.com/Terms.cfm>**

The SMS Engine for Windows

<http://stuhasic.com/smsengine>