



User Guide

MAIN MENU

The IDS SMS website has 7 main menu's before logging in, viz: Home, About Us, Prices, Purchase, Contact Us, Sign Up & Help. Two of which are covered below:

Sign Up

- § All fields except Contact 2 are mandatory.
- § The User name & Password will be required to log in and send Bulk SMS.
- § Once an account has been created IDS SMS is notified. Should you require SMS units to test the site, please 'contact us' and request units.
- § As soon as you have a USERNAME & PASSWORD you can log into the site

Log In

- § Enter the User name & Password you chose when signing up, this will take you to another menu, which will enable you to set up your account and send SMS. SMS Menu: Once logged in the following menu appears:
- § Home Page, Maintain Groups, Import Data, Maintain Numbers, Single SMS, Bulk SMS, Sent Report, Replies, Auto Delete, Sub-Accounts & Log Out

CLIENT MENU

After log in the following menus appear: Home, Maintain, groups, Import Numbers, Maintain Numbers, Single SMS, Bulk SMS, SMS Templates, Send Report, Replies, Auto Delete, Sub Account, Logout all of which will be covered below

Home Page

- § Your account details are reflected here.
- § Password can be changed
- § Time Difference can be changed.
- § Replies:
 - There are 3 settings for reply SMS.
 - To have SMS replied to your cell phone, enter cell phone number
 - To have SMS replies going to your email address, enter email address
 - Should you require an auto reply to you client reply, enter in the block: Reply Response.
- § These will be your default settings, but can be changed on the Single SMS & Bulk SMS page.
- § After any changes, account must be updated.
- § Below the account details are the last 10 credits to your account with date and time stamp.

Maintain Groups

- § It's important to start here and create one or more groups.
- § Groups allow the storage of many cell numbers to be placed where they will be easily found.
Example: Friends, Customers, Sales Team etc. Enter Group name and description.
- § Should the group being created need to be shared with a sub account, indicate No, Read or Write.
- § Sub accounts are accounts you can create and control for others to use the SMS facility as well.
- § Below Create Groups is a list of groups created.
- § Information supplied: Group Name, Description, amount of numbers in the group,
- § Group owner, date & time created & shared information.
- § Group can be deleted, click block adjacent to group and click Delete Selected
- § Edit Group: Click EDIT.

Import Numbers

Insert single number:

- § A single number can be entered into a group.
- § Select group to which the single number must be added.
- § Input values: Number & Value's 1 to 6
- § Prevent duplications: click 'Check for numbers across all groups'
- § Deleted: Will prevent import of numbers on the Auto Deleted list.
- § Value 1 to 6 is explained under Bulk Import.

Bulk Import:

- § Prepare a spreadsheet with the numbers and values added as follows:
- § Microsoft Excel can be used, failing that you can use Open Office.
- § Open Office can be down loaded free of charge. www.openoffice.org

0831234567	Peter	Smith	R300			
0827894563	John	Black	R4000			

Note:

The titles at the top of the example above is to identify whats in each column for explanation purposes only, in the spreadsheet to be uploaded the data must start from row 1. The first column (A) is for cell numbers only Columns B to G is for any variable you wish to add into your cell number pertaining to the person linked to the relevant cell number. This allows you to send bulk SMS and make it appear to be personal, and includes number/s or word/s to be used for a specific client.

For example:

Dear **Peter Smith** we thank you for your donation of **R300**

Dear **John Black** we thank you for your donation of **R4000**

How to insert these into Bulk SMS will be explained under Bulk SMS.

Additional notes on using Excel:

Excel:

Importing data from excel is by far the easiest. The data is imported from "Sheet1" only (please ensure that the name of worksheet is 'Sheet1'). The excel document needs to contain the mobile number in Column "A". You can place data in columns in "B" through "G". The data will be imported into 6 value fields, Column "B" will appear in Value1 etc. Each field can contain 50 characters with the exception of Value1 or Column "B" which can accommodate data up to 160 characters. This allows you to import a file with the number in Column "A" and message in Column "B". When sending to the group leave the message blank, just click on "Value1", this will place the message (stored in Value1) into the message field to be sent.

Notes on CSV/Text download formats:

CSV/Text:

Importing from a CSV (Comma separated file) or Text file is just as easy. The files data is simply separated with a comma (.). The number needs to be contained as the first field in the file. You can create a CSV file from an Excel spreadsheet by saving the Excel file as "CSV (MS-Dos) file type and not Excel workbook. There is a slight benefit of using CSV, as the file size is smaller.

Once the data has been set up in one of the above formats it can be downloaded as follows:

- § Select group to which data must be imported.
- § If there is data in the group already it will only append new data and not overwrite all the previous data, in this way you can keep adding to your data.
- § Browse for the file you want to import.
- § Select the file type you wish to import.
- § Click import Data.
- § Once imported confirmation on the import status is displayed.

Maintain Numbers

- § To view the numbers in the various groups, select the group desired or leave to default to all groups.
- § Enter search criteria or leave blank to give all numbers or all numbers in a selected group.
- § Select 'Display' if you want to display the values you added in when loading you data, eg Value1 could be the client name, this will assist you to identify the number.
- § Numbers are listed below the Search Filter area.
- § Each number can be edited by clicking EDIT next to the relevant number.
- § Numbers can be deleted individually. Select and click delete selected.
- § Can send SMS to selected numbers or all numbers.
- § There is a 'select all' or 'none' function to assist in working with your data.
- § 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, its important to select one page then send your SMS, going to the next set will not carry over your selection.
- § Once you have done a search for data and the data is listed, there are additional functionals, viz: Move/Copy Selected. This allows you to move or copy date from group to group.

Single SMS

To send a single SMS:

- § Set date and time of single message to be sent, if left at default, SMS will be send upon clicking 'SendSMS'
- § Enter Cell number (Number to)
- § Enter message, max 160 characters

Replies:

- § There is a 7-day window for the SMS receiver to send back a reply.
- § A choice of where the reply is to go to:
 - § To a mobile, enter cell number.
 - § To an email: enter email address
 - § Leave blank to receive replies back to the IDS SMS under menu item Replies.
 - § To send an automated response to the reply fill in the text area 'Send Response'.

Bulk SMS

- § Select group to which SMS is to be sent.
- § Select date & time to send the Bulk SMS
- § If not adjusted, the setting will remain at current date and time.
- § Enter message, where imported value is required selected value as required.
- § Value 1 = Column B, to value 6=G in the original spreadsheet before uploading.
- § Eg: Dear @@Value1@@ thank you for your donation of @@value3@@ ... etc

Replies:

- § Should you require the SMS replies to go to a cell phone, enter cell number under, 'Forward to Mobile', like wise for sending
- § replies to your email address, and enter email address under 'Forward to Email'
- § If an automated response is required on the replies received, enter text under: send response.
- § If no entries are made the replies go back to the IDS web site under the menu item 'Replies'.

SMS Templates

- § This is a powerful feature for routine SMS sent.
- § Set up SMS here and save them
- § Once you go to Single SMS or Bulk SMS menus there is a drop down menu from which you can select a SMS, do some minor editing if required and send.

Sent Report

- § For feedback on items sent, you can do a date search for the relevant Bulk SMS sent.
- § Report will have the following details: Scheduled for, Submitted, Numbers, Cost, View, download.

Replies

- § All replies to the SMS web site can be date searched.
- § Filtered further by searching for All, Read or Unread replies.
- § To include values 1 to 6 in the replies to easily identify the sender click 'Include Sent detail, and click 'Search'

Auto Delete

- § Numbers placed on the auto delete list will be deleted and should the same number be imported again it will be deleted again on importing.

Sub Accounts

- § A IDS SMS account holder can create sub accounts.
- § A sub account is a facility to delegate authority to others to send Bulk SMS under their own password and username.
- § Units can be transferred to the sub account holders from the primary account, by clicking EDIT on the relevant account line.
- § When creating Groups under the menu item Maintain Groups, you have a choice to make the group available to a sub account holder as read only or write.
- § Create a sub account by adding in Username, Password and Fullname, click create Sub-Account.
- § The account will be visible in a line below.
- § To EDIT the sub account click EDIT on the relevant LINE.
- § To Edit the sub account the following can be done:
- § Change Password, Full name, activated or deactivate the sub account and change Time Difference.
- § To allocate credits to the account enter the number of credits for the sub account and a note if required and click
- § Update Credits. Note: check the primary credit stock before allocation of credit to see if there is enough units available.

Logout

To log out or leave the logged in area, returns you to the main menu home page.