SendQuick SMS Messaging User Manual

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SendQuick SMS Messaging User Manual

1.0 Introduction

1.1 About SendQuick

SendQuick™ develops and offers enterprise mobile messaging solutions to facilitate and improve business workflow and communication. Our solutions are widely used in areas such as IT alerts & notifications, secure remote access via Multi-Factor Authentication, emergency & broadcast messaging, business process automation and system availability monitoring.

In addition to functionality, SendQuick's messaging solutions have also been developed with other key features in mind. These include security and confidentiality of company information, and ease in mitigating disruption during unplanned system downtime such as that arising from cyberattacks. Our solutions are available in the form of server-grade hardware Appliance, Virtual Machine or Cloud-based.

SendQuick is your Innovative Partner for future-proof enterprise mobility solutions — used by over 1,500 corporations, with over 2,000 installations, including many Fortune Global 500 companies, in over 40 countries across the banking, finance, insurance, manufacturing, retail, government, education, and healthcare sectors.

1.2 Purpose of Document

Welcome to SendQuick SMS Messaging User Manual. This document is prepared for the User administrator and Users, as a guide for using SendQuick Messaging Interface for sending and receiving SMS. This is a different interface from the SendQuick Server Administration, which is provided in Server Administration manual.

Before using the SendQuick Messaging Interface, the Server Administrator will configure the SendQuick Server for it to work in your company's network. The Administrator will need to work on the network configuration first, or to assign the Domain Name to the system. Once the IP address (or domain name) had been configured, you can access SendQuick Messaging from any workstations using a web browser.

2.0 Accessing the Portal

To access the SendQuick Messaging Interface, open your web browser and type the following for the URL:

- http://<SendQuickIPorDomainName>/
- http://<SendQuickIPorDomainName>/webapp/

> Note: Please check with your Server Administrator for the IP address or domain name they have configured for SendQuick.

The web interface presented is as shown in Figure 2-1 below.

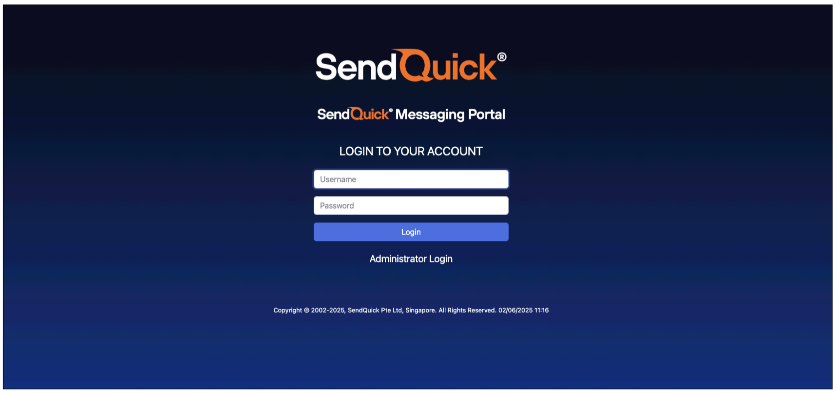

Figure 2-1: Messaging Portal Login Page

Please refer to your System Administrator for the login details.

3.0 Main Menu Interface

3.1 Exploring the Interface

After logging in to the system, you will see the following main dashboard area. The home page is set to be the **Send SMS** page for quick access to that function.

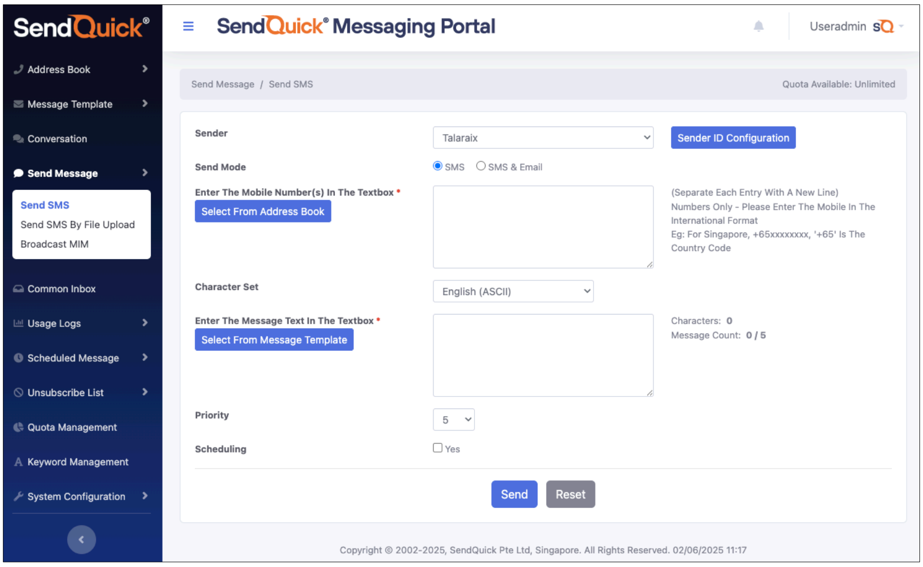

Figure 3-1: Home page - Send SMS

3.2 Changes to Profile

Your profile name is displayed at the top left-hand corner of the dashboard.

To change your password for this system, click on **Change Password** in the dropdown menu at the top-right hand corner under your account name.

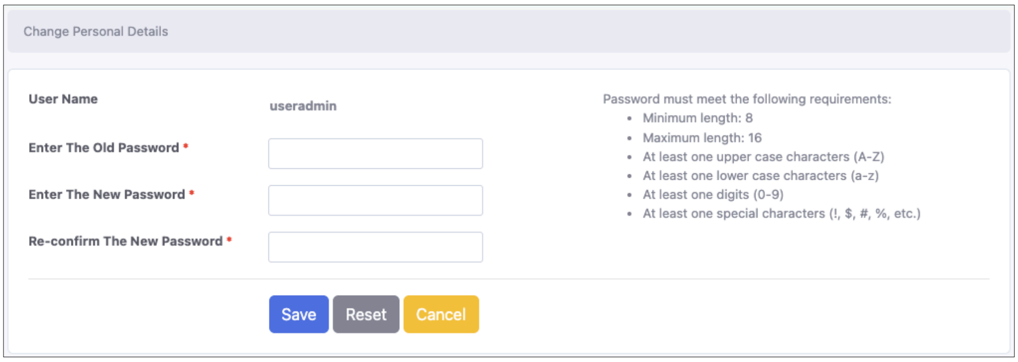

Figure 3-2: Password Change Page

3.3 Menu Items

On the left-hand side of the interface, and in the drop down on the top right-hand corner, you can find the following menu items. In the following sections, we will go into more details for each function.

The available items in the Main Menu are:

Menu Items	Description
Address Book	Create, edit and delete users in Personal and Global Address Book with Grouping function
Message Template	Create, edit and delete message template for future usage
Conversation	Manage ongoing conversations
Send Message	Send SMS by manual composition or File Upload
Common Inbox	Incoming SMS that did not match any keywords
Usage Logs	Review Inbox, Outbox and Queue messages
Scheduled Message	SMS messages scheduled and waiting to be sent
Unsubscribe List	Users who requested not to receive any SMS messages
Quota Management	Add, delete and top-up of SMS quota for every user
Keyword Management	Routing for incoming/received SMS message
System Configuration	Configuration for time control and image upload

The available items in the dropdown menu are:

Menu Items	Description
Change Language	Change the display language
Change Password	Change your password
User Management	Create, edit and delete users. Assign role and manage user departments.
Logout	Terminate the current session and log out of your account

4.0 User Management

The User Management features can be found in the top right-hand dropdown menu. These features allow the User Administrator (administrator) to create, edit and delete user in the web system. In addition, there is also a department and role management module in the system

The following describes the individual items in the User Management section:

Department Management	This section creates the departments where the users will be assigned for their web access.
Role Management	Role assignment where each role has different access rights for the users.
User Management	Create users and assign them to the different department with different access rights

4.1 Department Management

The purpose of Department Management is to organise the users into different departments. The user administrator can create and delete departments.

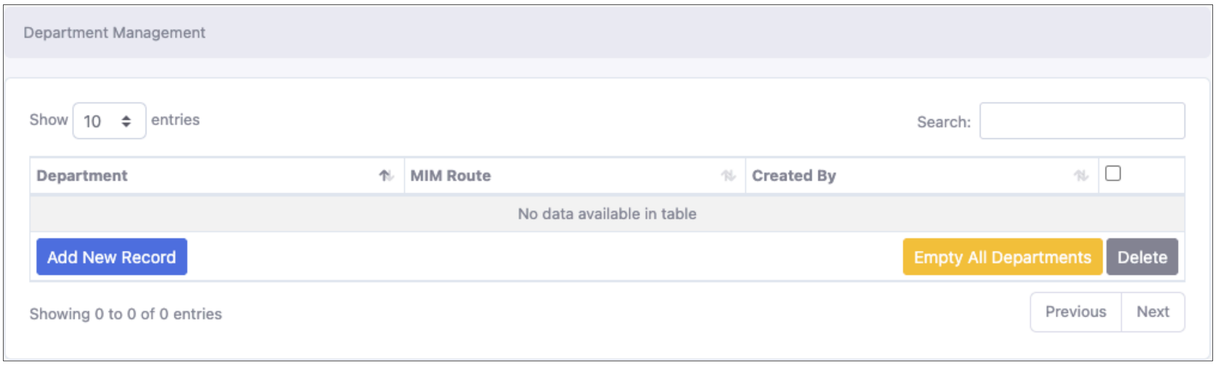

Figure 4-1: Department Management

To create a new department, select **Add New Record** button and enter the name of the department. Once ready, click the **Save** button and the new department is created.

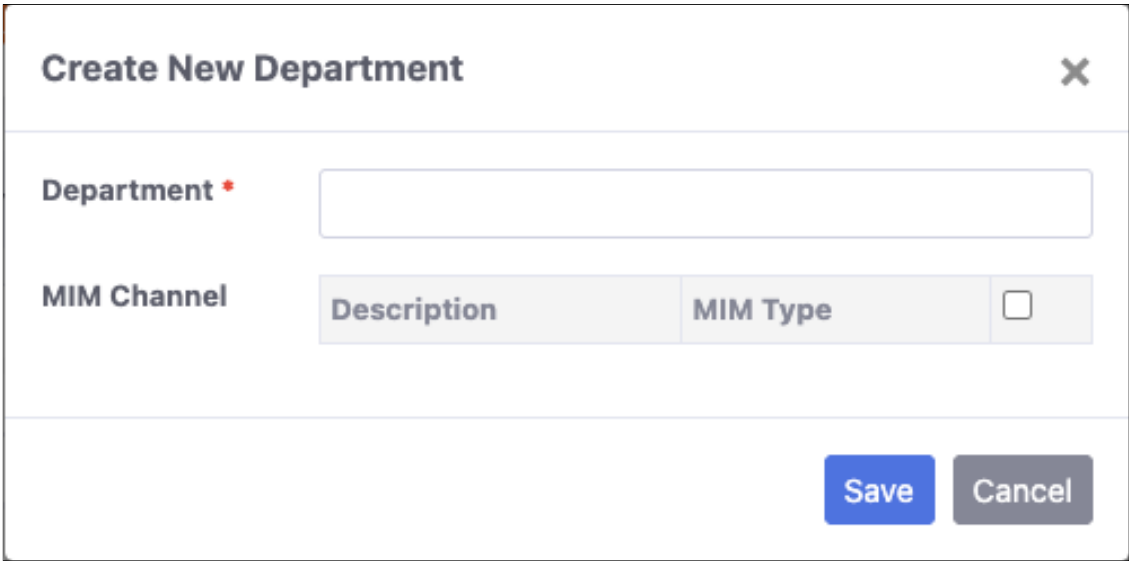

Figure 4-2: Create New Department

4.2 Role Management

After creating department, the administrator should create the different roles that will be assigned to different users in the organisation. The roles are defined as different access rights with respect to using the SendQuick Messaging web interface. Hence, the different roles will have different access rights to perform different functions.

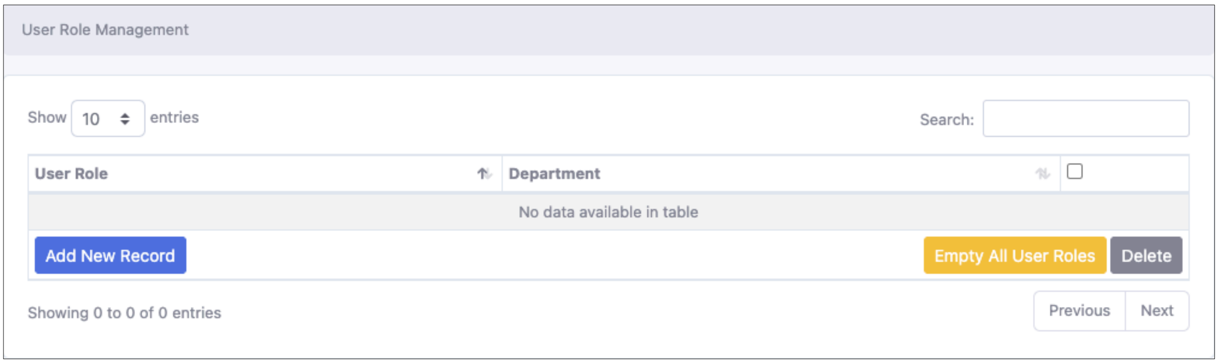

Figure 4-3: Role Management

To create a new role, select **Add New Record**, name the **User Role** and select the different access rights for the role.

In Figure 4-4, the roles can be assigned to All Departments or to specific department, by selecting from the drop-down menu selection.

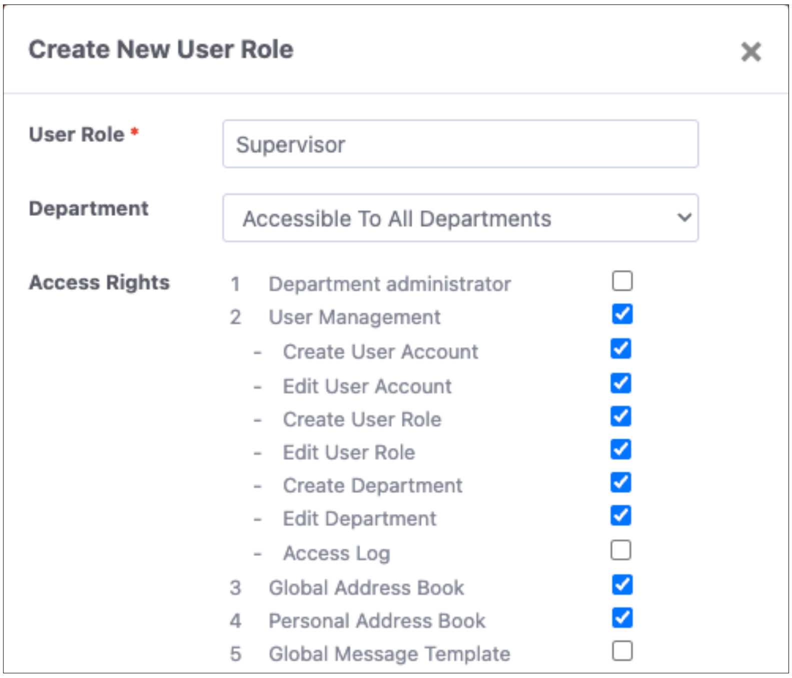

Figure 4-4: Create New User Role

There numerous access rights items that can be assigned/selected for different roles. The different access rights grouping will differentiate the access rights for the different roles.

The access rights that are not selectable (not provided) under the role will not be shown on the Main Menu bar of the user. Hence, if the access rights are not assigned, user will not be able to use the feature. This serves as an access control function.

Access Rights	Description
Department Administrator	Have the access rights to create and delete department information
User Management	Rights to create, edit, delete the user role, department management and user accounts
Global Address Book	Rights to access, add, edit and delete global address book
Personal Address Book	Rights to access, add, edit and delete personal address book
Global Message Template	Rights to access, add, edit and delete global template
Personal Message Template	Rights to access, add, edit and delete personal template
Send SMS	Rights to send SMS
Change Personal Detail	Rights to change personal details
Unsubscribe List	Rights to access and manage unsubscribe list
Quota Management	Rights to assign, top-up, renew quota for individual users
System Configuration	Rights to configure the send SMS time control and other system configuration features

4.3 User Management

The User management section is to create the users and assign roles and departments to individual users.

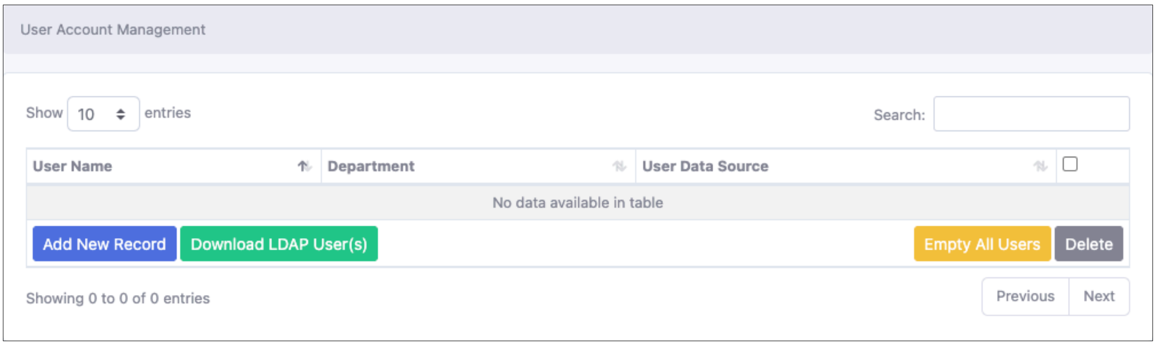

Figure 4-5: User Account Management

Select **Add New Record** to create a new user. Insert the Username, Password and all other information as required.

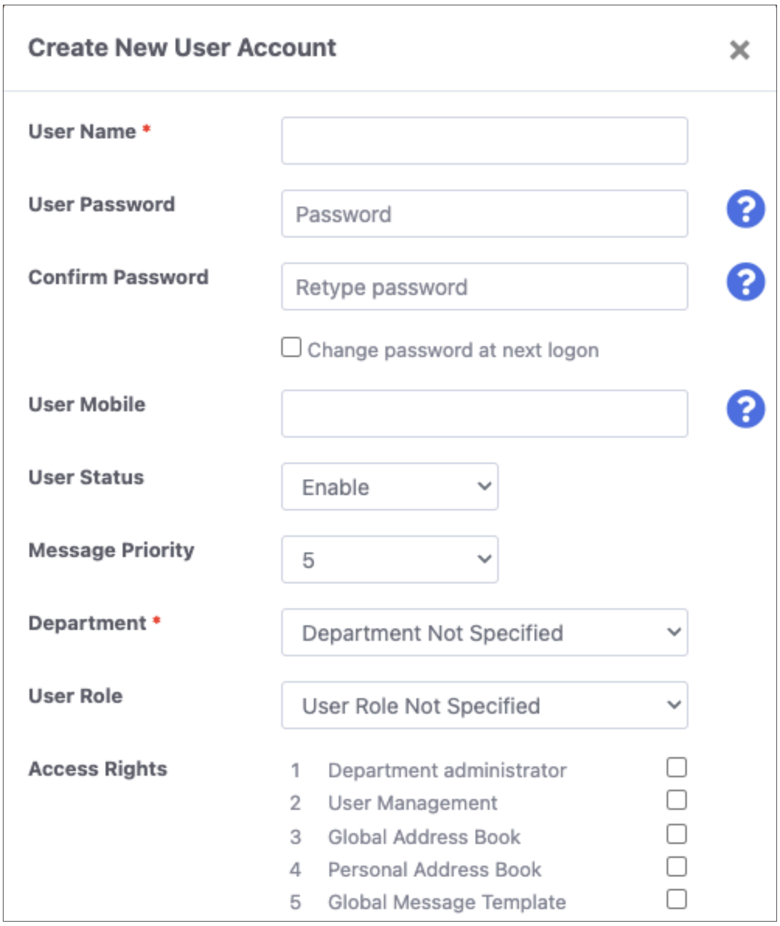

Figure 4-6: Create New User Account

You can assign individual access rights to the new user or select the pre-defined roles, and the roles will be automatically assigned. You can also have a mixture with additional rights by selecting on the check relevant box.

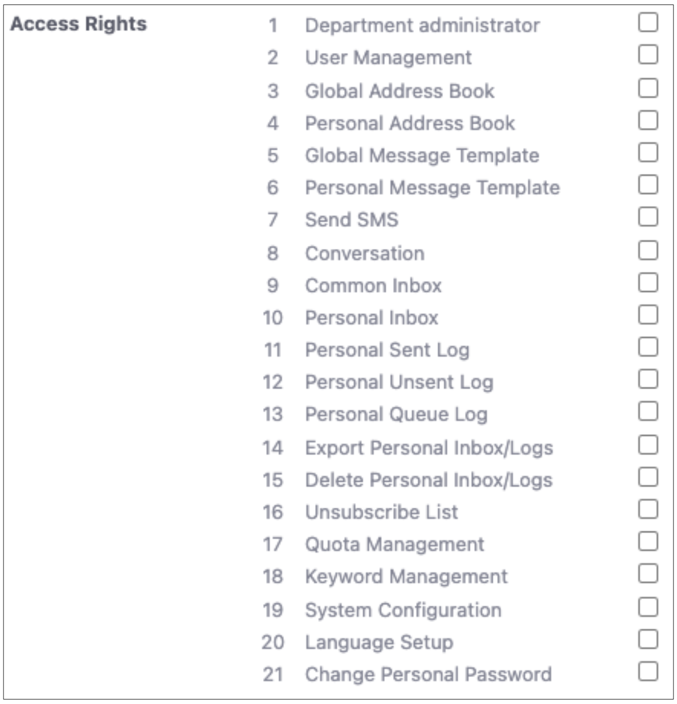

Figure 4-7: User Account Access Rights

For downloading of users from LDAP, the administrator needs to define the following:

- LDAP Server
- Department
- User Role

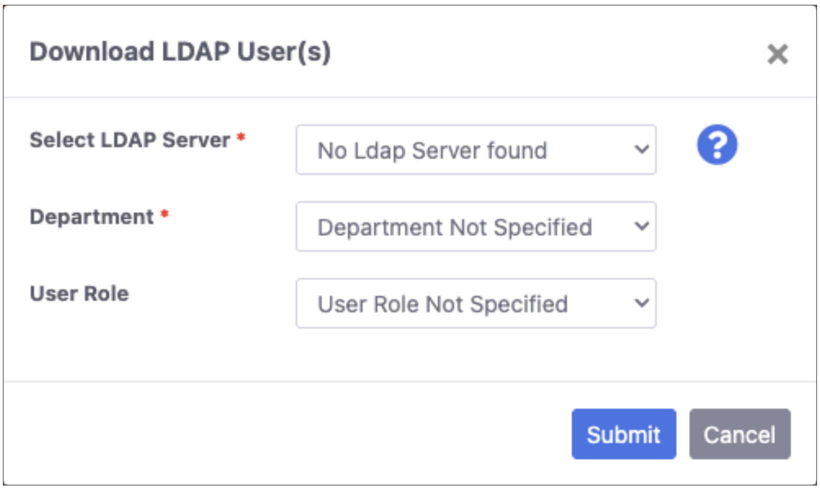

Figure 4-8: Download LDAP User(s)

4.4 Access Log

The last item is the User Access Log. This is the access log of each user and the date, time, IP address and browser type are documented.

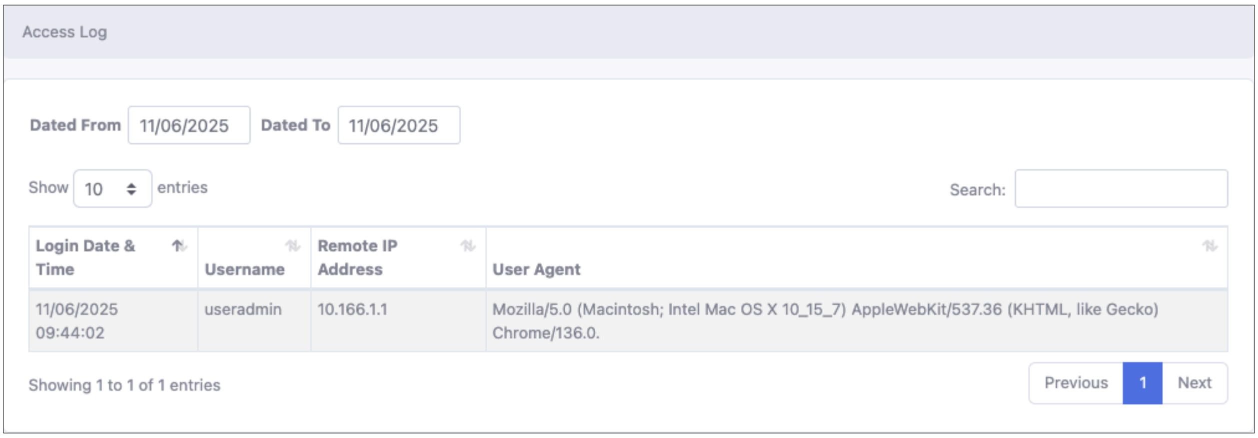

Figure 4-9: Access Logs

5.0 Address Book

The Address Book section consists of Personal and Global Address Book. For both Personal and Global, there is a contact management as well as group management. The address book data can be used when sending SMS.

Personal Address Book is the contact list that is accessible by the user only. Global Address list is access by all users, but only certain users have the access to add and edit the list, depending on the access rights granted.

5.1 Personal Address Book

The Personal Address Book is where all the contact list for the users are stored.

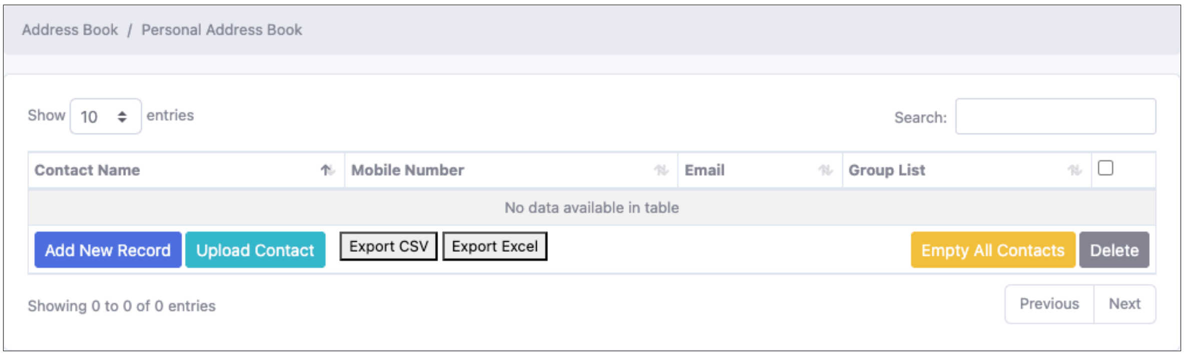

Figure 5-1: Personal Address Book

Select **Add New Record** to enter the name, mobile phone number and assigned group(s) to create new personal contact.

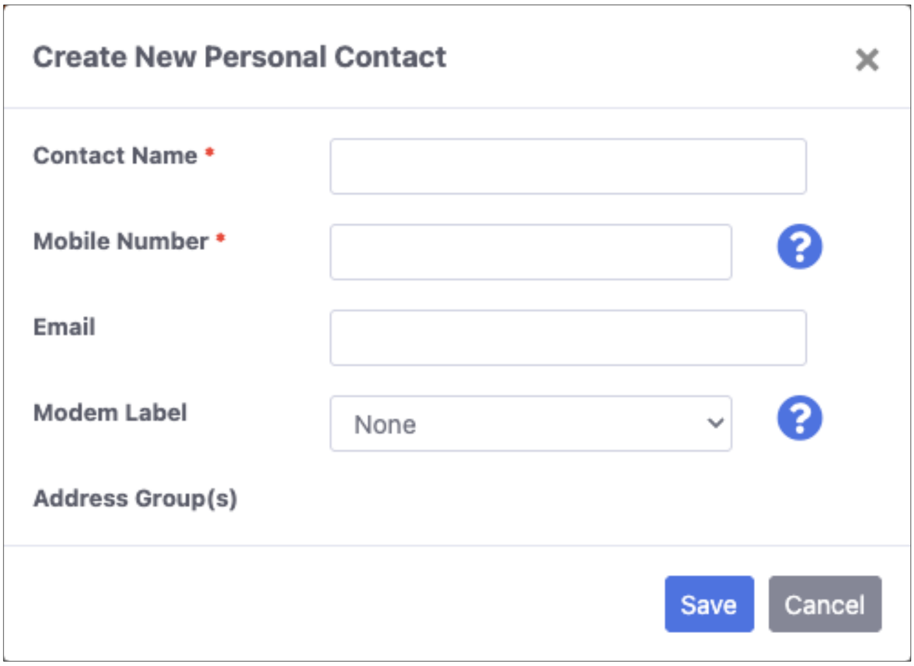

Figure 5-2: Create New Personal Contact

5.2 *Personal Address Group*

The individual contact list can be assigned to different groups. Select Address Group in the sub-menu and a list of groups are displayed.

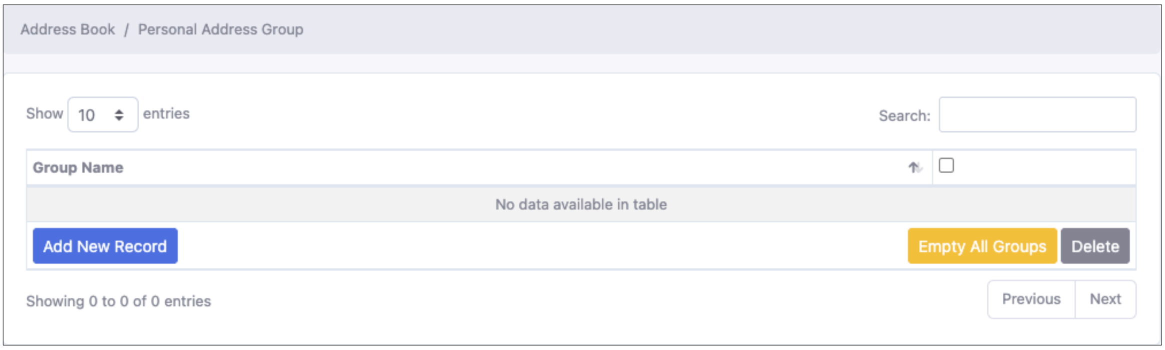

Figure 5-3: Personal Address Group

To create a new group, select **Add New Record**. Enter the group name and select **Save**

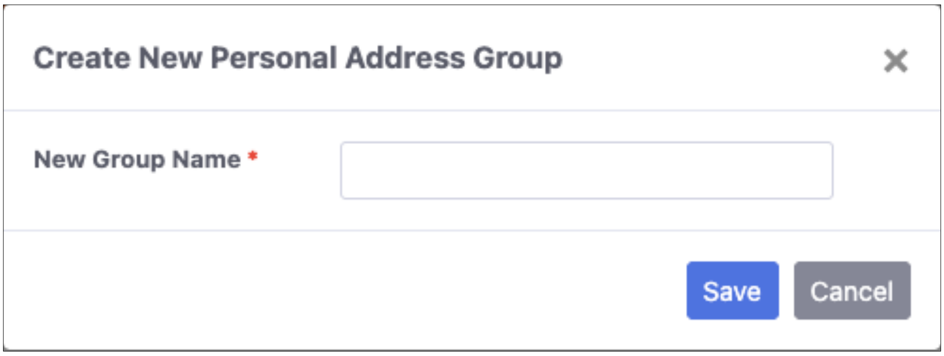

Figure 5-4: Create New Personal Address Group

5.3 *Global Address Book*

The Global Address Book function the same way as Personal Address Book but the access rights is for all users to use the contact list but editing rights are limited. The Global Address consists of inserting new records as well as creating the groups.

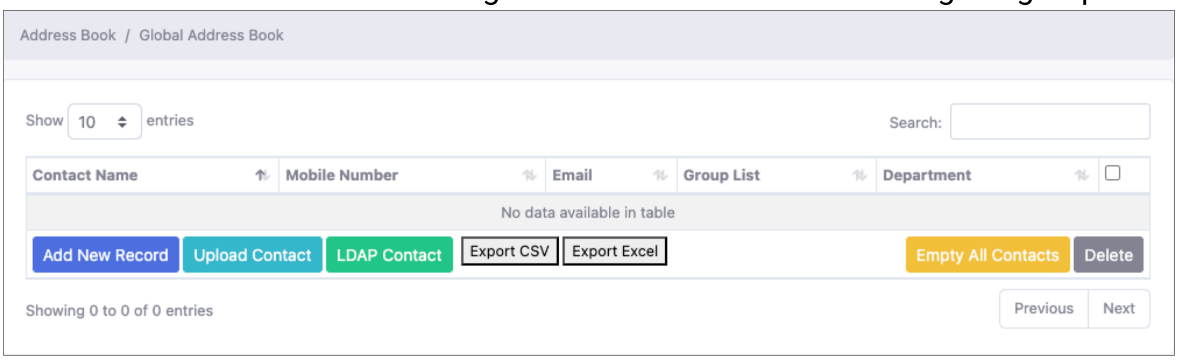

Figure 5-5: Global Address Book

The creation of new global contact is similar to that of contact creation under personal address list. Select the **Add New Record** and create the new record as shown

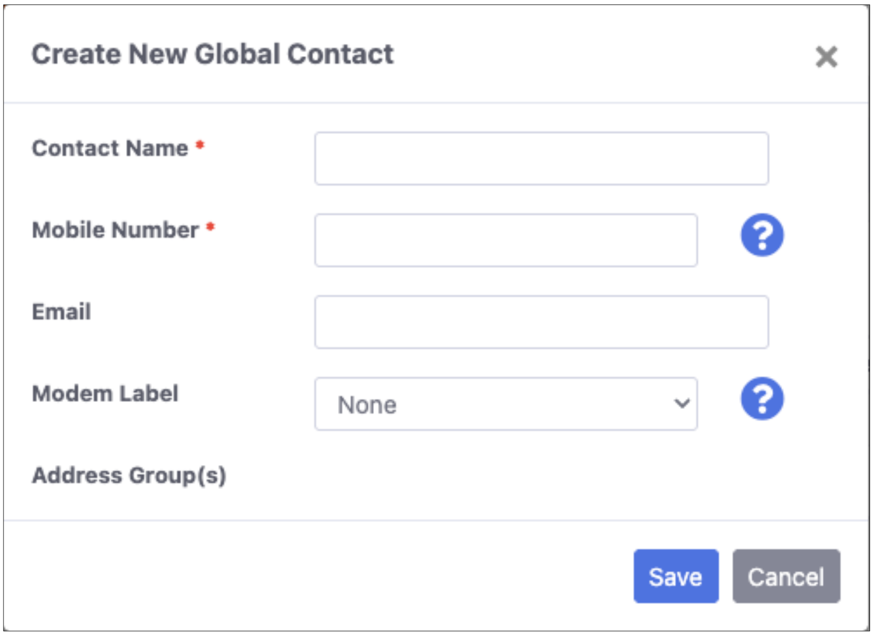

Figure 5-6: Create New Global Contact

5.4 Global Address Group

The global group management is similar to how personal group is managed.

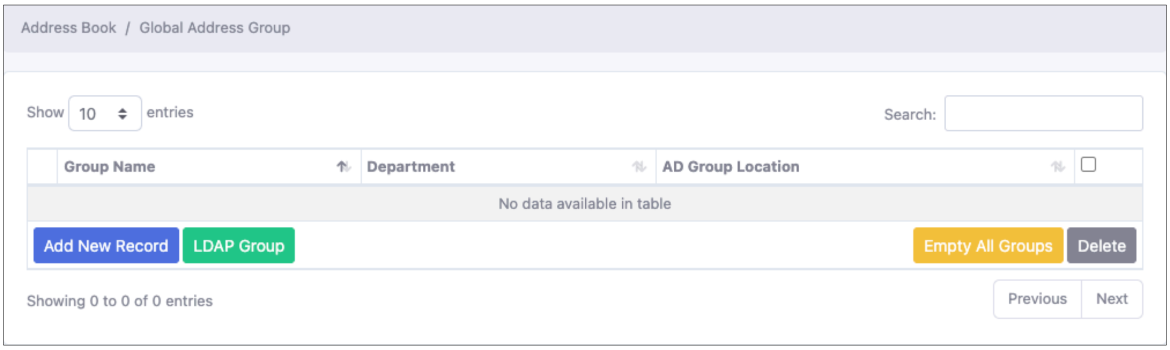

Figure 5-7: Global Address Group

Select **Add New Record** and enter the relevant group name and select **Save.**

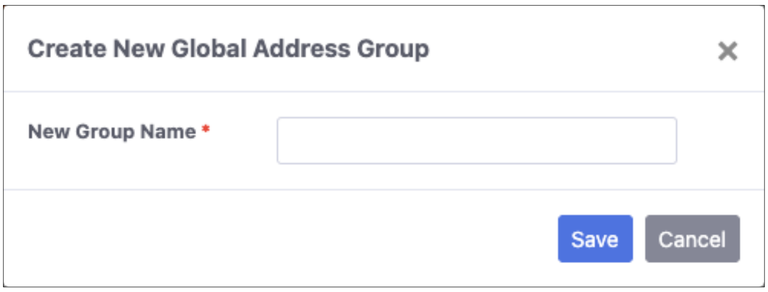

Figure 5-8: Create New Global Address Group

6.0 Send SMS Messages

Send SMS using SendQuick Messaging interface is the primary reason for the existence of SendQuick. Therefore, this section will explain how a user can send SMS using SendQuick system.
There are two ways of sending SMS using SendQuick:

1. Send via web interface
2. Send using file upload.

6.1 Send SMS via Web Interface

This is the default interface for all users when they log-in to SendQuick.

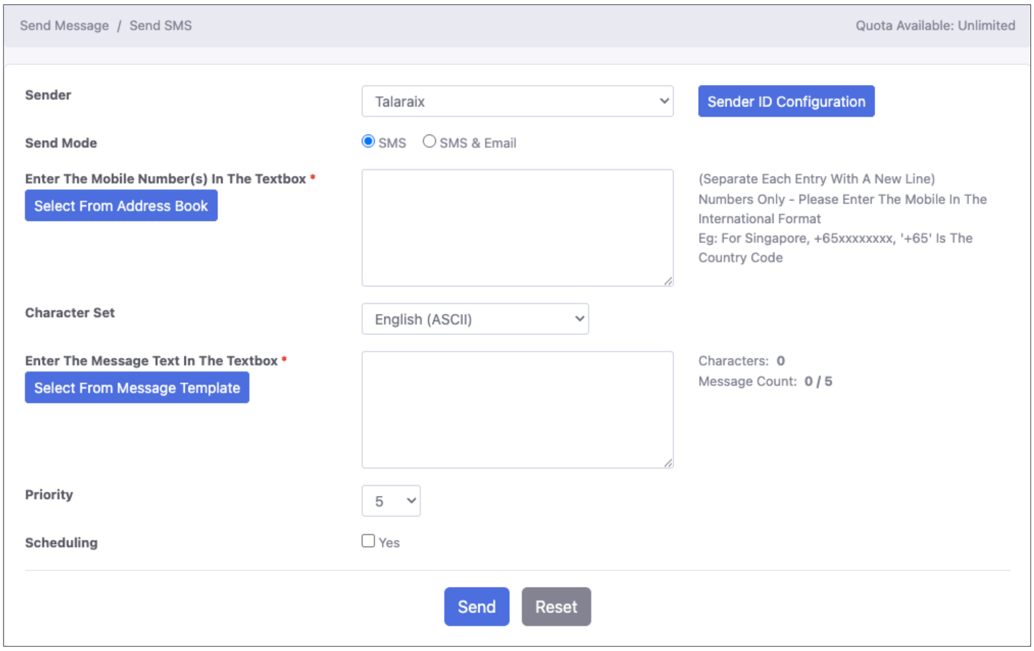

Figure 6-1: Send SMS - Web Interface

First, select the **Send Mode**. Next, insert the mobile numbers. The mobile numbers can be manually inserted in the text box with one entry per line. The user can also insert the numbers from the address book (personal and global) by selecting the **Select From Address Book** button.

Then, select **Character Set**, **Priority** and **Schedule** (if required).

Compose the SMS (text) message in the text box provided. Similarly, the users can select pre-defined messages from the templates by selecting the **Select From Message Template** button and select the relevant template. The character count and number of SMS messages are shown below the message box. Once done, select **Send**.

If the messages are sent immediately, these messages will be reflected in the SMS Queue Log and Sent Log. If the messages are scheduled for a sending on a later date and time, the messages will be stored in the Scheduled SMS.

6.2 Send SMS via File Upload

Another sending method is using file upload. This means creating the data file (in Excel, OpenOffice or database) and save the file a Comma Separated Value (csv) or Tab Delimited file (text) and us them to send bulk SMS to the recipients. This method does not require the contact list to be saved in SendQuick server.

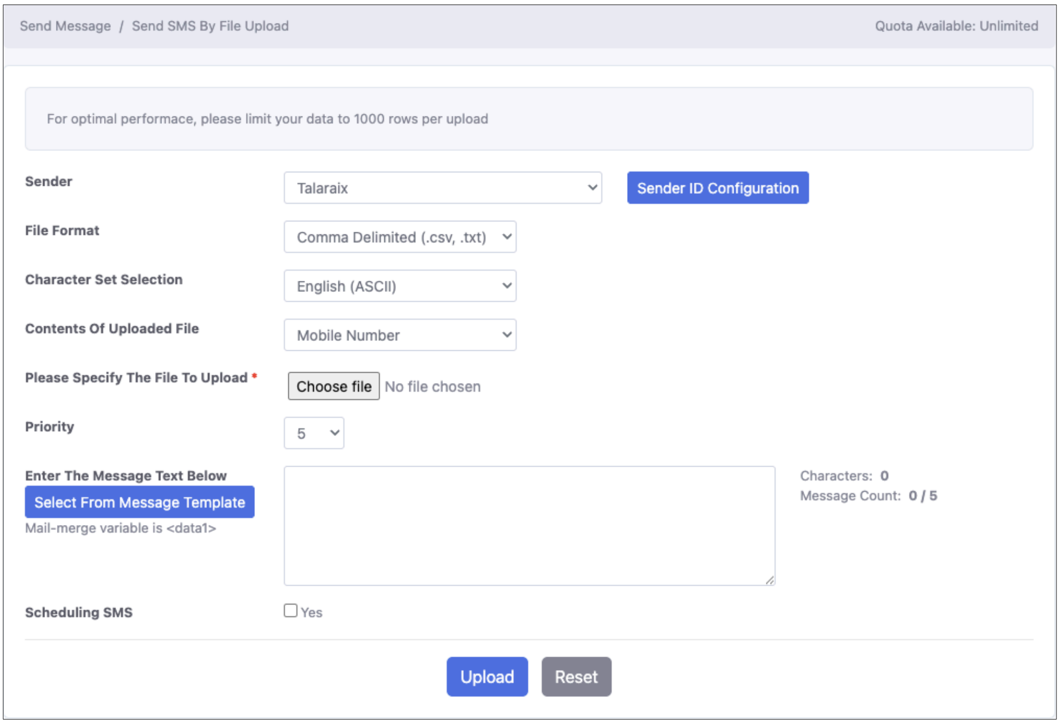

Figure 6-2: Send SMS - File Upload

After selecting the **Send SMS By File Upload** button, the interface for sending will appear. The table below explains the various items in File Upload feature.

Item	Description
File Format	Select the file format type that is being used. Select between **Comma Separated Value** or **Tab Delimited** format
Character Selection	Select either **ASCII** or **UTF-8** (if sending chinese)
Contents of Uploaded File	The type of files to be uploaded: • Mobile Number only ◦ The file will consist of mobile numbers only, with one number for each line: eg, *91234567* (one number one line) • Mobile Number and Data ◦ The file consists of mobile number and single/multiple data fields used for mailmerge into the message content when sending SMS. Each data set is one line: eg, *91234567,john,2:00pm* (where John is the first data <data1> and 2:00pm is <data2>. The phone number is not a data set) • Mobile Number and Message ◦ This is the format where the SMS message is in the file. When this option is selected the SMS text box will disappear. The

	format (one record one line) is as follow: eg, *91234567,this is a reminder message for John*
Specify the File	**Browse** and select the required file
Schedule SMS	**Select** (check) if the messages need to be scheduled. Select the desired **Date** and **Time** to send the SMS
Priority	**Select** the desired priority setting
Message Text Box	If the text box appears, **Type** the message or insert the message from the templates.
Select From Template	Select the relevant messages from any templates that had been created before (see Section 7.0 on Message Templates)
Message Counter	This indicate the number of characters in the SMS message (each SMS is 160 characters) and how many SMS to be sent for the message (multi-part)

After the file and message has been selected, the messages are pre-processed and a preview (of the messages) are presented. If there is any error, it will be indicated. Similarly, if the format is correct in accordance with the selection, then the status will be indicated in the preview.

Once the preview data is satisfactory, select the **Upload** button and the messages will be sent. Do understand that the preview and sending SMS process may take some time if the number of records in the file (upload) is large, example more than 5000 records.

We do advise users to note the following practices when sending SMS using File Upload:

- Do use a smaller file (say 20 records) with some test records to test the file format and the uploading process. You do not need to send the messages. Just reach the preview stage to determine whether the file if processed correctly. Such practice session is highly recommended to avoid accidently sending mass messages that erroneous.
- When it is ready to send, it is advisable to send multiple batches if you are planning to send a large number of records. This will help to reduce error which may happen when sending large files with large number of records
- When the sending process (after preview), please do not close the browser as the browser technology is used to send the messages. Close the browser only when the Messages Sent message appear.

Please refer to the Messages Log to review the message sent status as explained in Section 12.0 Message Logs Management.

6.3 Broadcast MIM

This page is for broadcasting messages via MIM channels. Like SMSs, you may also choose to schedule the messages you send through MIM. However, the fields to fill will vary based on the content type you are broadcasting.

a. Content Type: **Text**

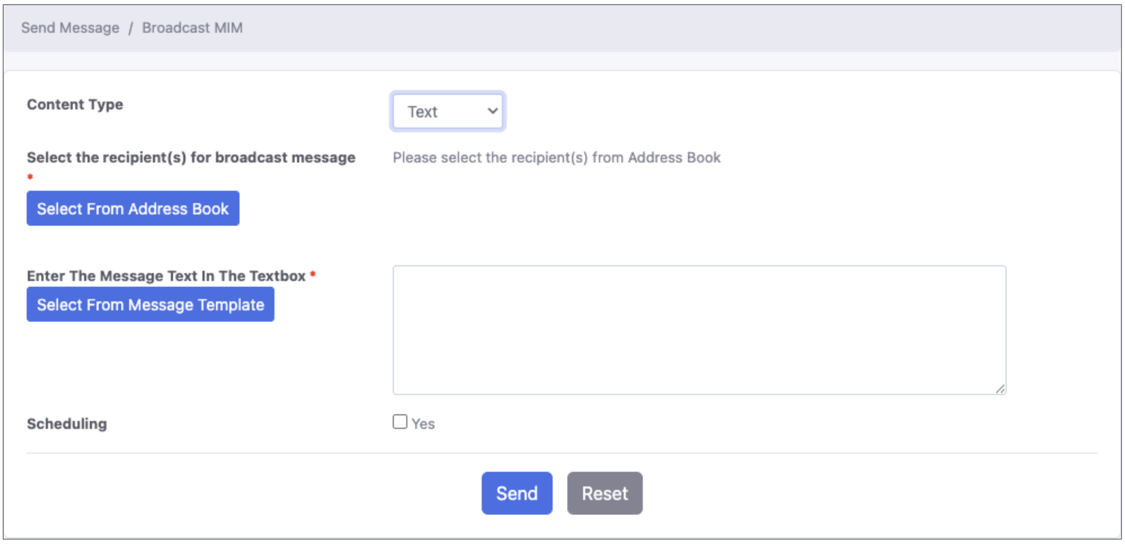

Figure 6-3: Broadcast MIM – Text

To broadcast text, select the recipients via **Select From Address Book** then fill the textbox. You may also choose to use a pre-configured template via **Select From Message Template**. Click **Send** when you are ready.

b. Content Type: **Image**

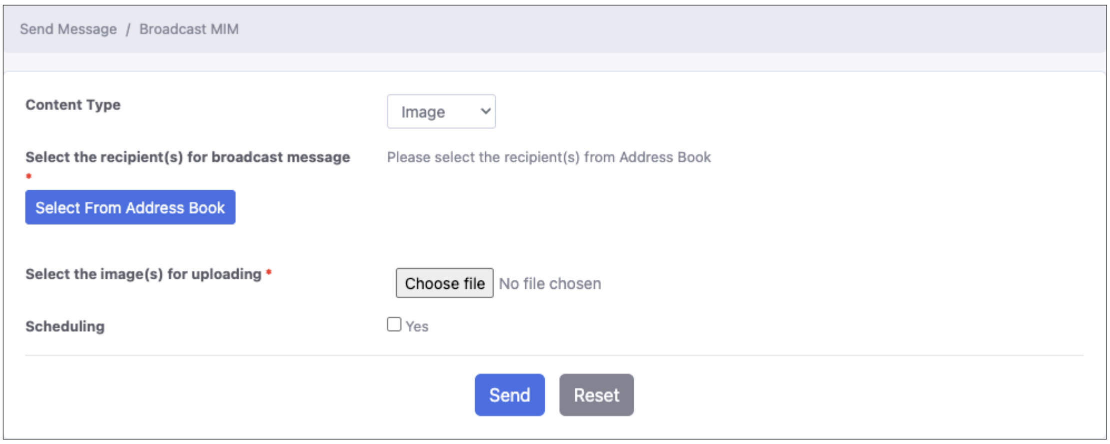

Figure 6-4: Broadcast MIM – Image

To broadcast an image, first select the recipients via **Select From Address Book**. Next, upload the image file you want to broadcast. Finally, click **Send** when you are ready.

c. Content Type: **Template**

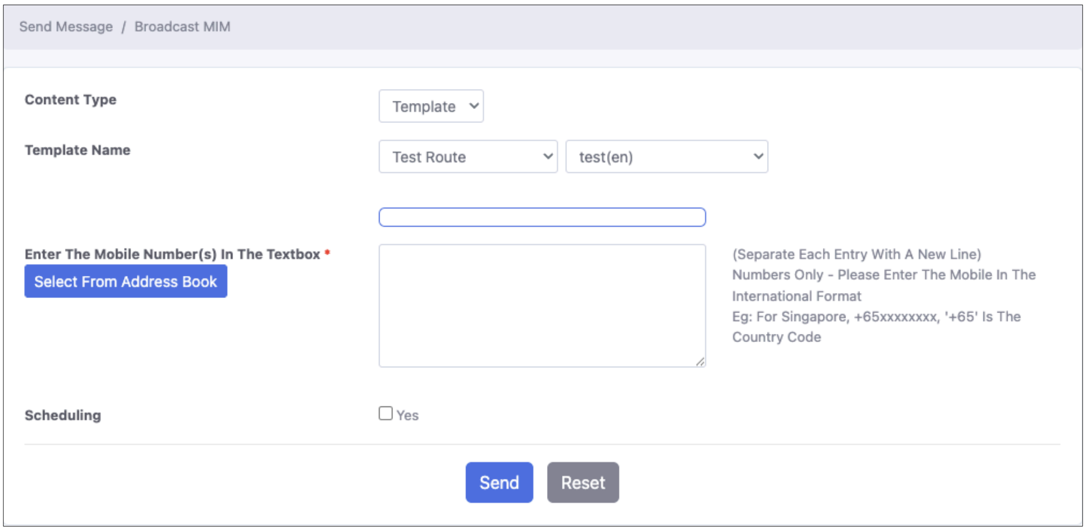

Figure 6-5: Broadcast MIM – Template

To use a pre-configured MIM routing and template, choose the desired route and affiliated template under **Template Name**, then either manually input the mobile numbers of the recipients, or select them via **Select From Address Book**. Click **Send** when you are ready.

7.0 Message Templates

Message Templates are messages that are pre-defined for future use. Having message templates allow the user to easily retrieve the messages, perform some simple edit (or no editing) and use them to send SMS. Message template can be quickly retrieved in the Send SMS page

There are 2 Message Templates:

- Personal Template
- Global Template

7.1 Personal Message Template

When the **Message Template** link is selected, the Personal Message Template Listing is shown

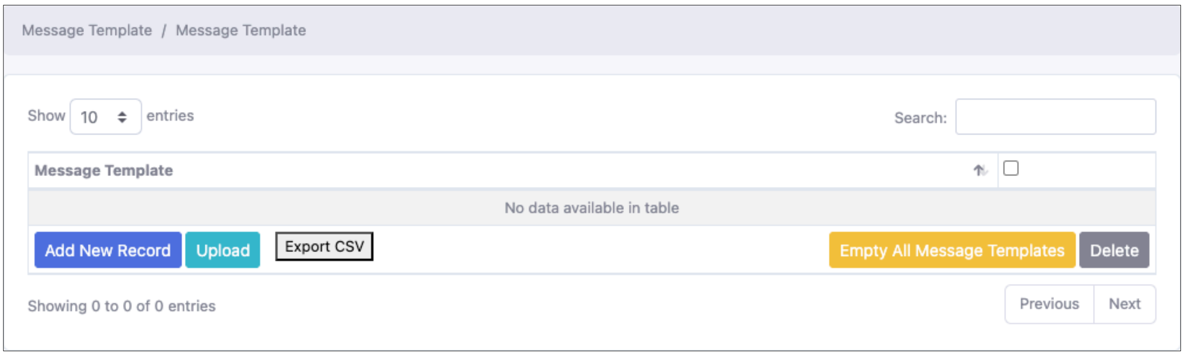

Figure 7-1: Personal Message Template

Select **Add New Record** to add a template.

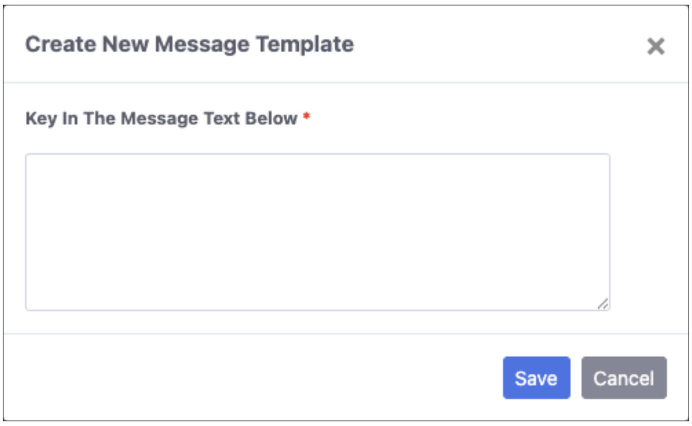

Figure 7-2: Create New Personal Message Template

7.2 Global Message Template

When the **Global Message Template** link is selected, the Global Message Template Listing is shown

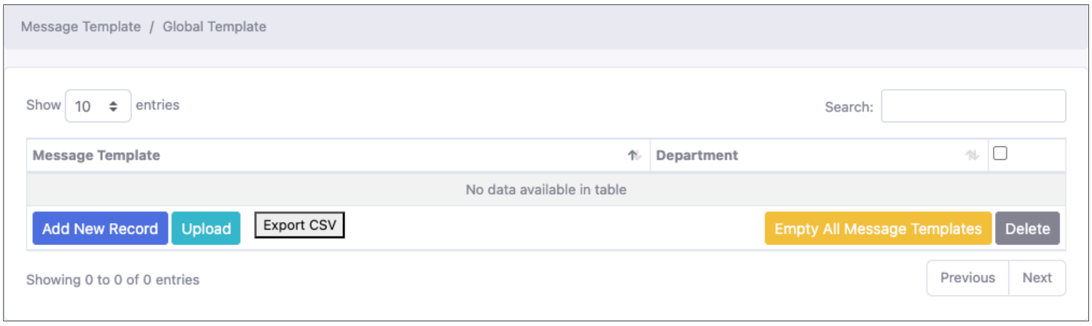

Figure 7-3: Global Message Template

For global template, select **Add New Record** button or the **Edit** link and perform the addition and changes

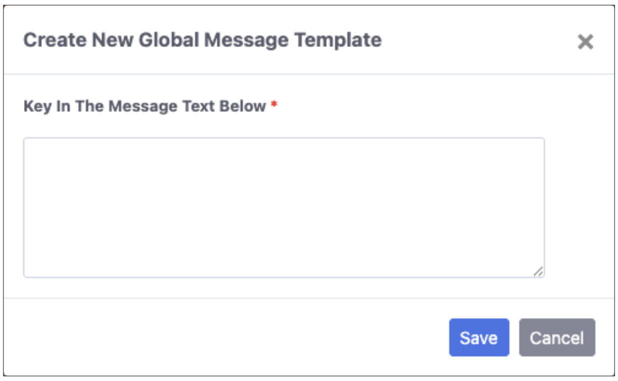

Figure 7-4: Create New Global Message Template

8.0 Scheduled Message

The Scheduled Message pages show the list of messages that have been scheduled to be sent on a later date and time. Once the messages are sent, they will be shown in the Sent Log. The messages in the scheduled list can be deleted by selecting and deleting the messages as long as it has not been sent. The subpages available are for **Scheduled SMS** and **Scheduled MIM**.

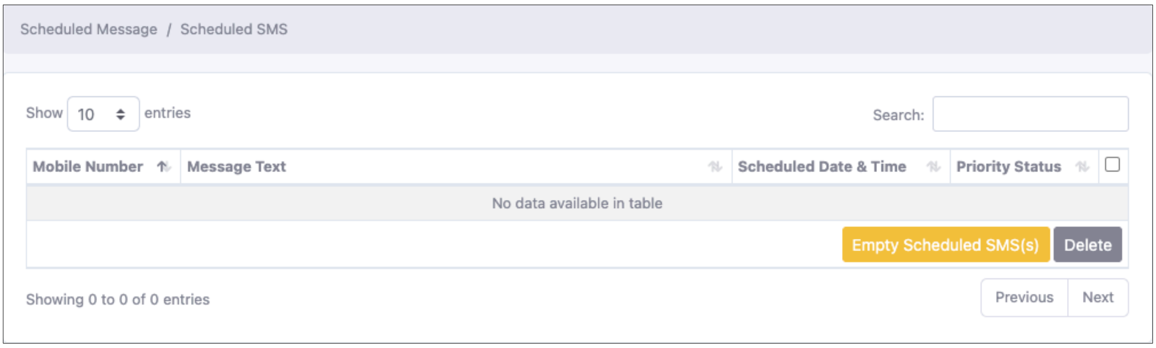

Figure 8-1: Scheduled SMS

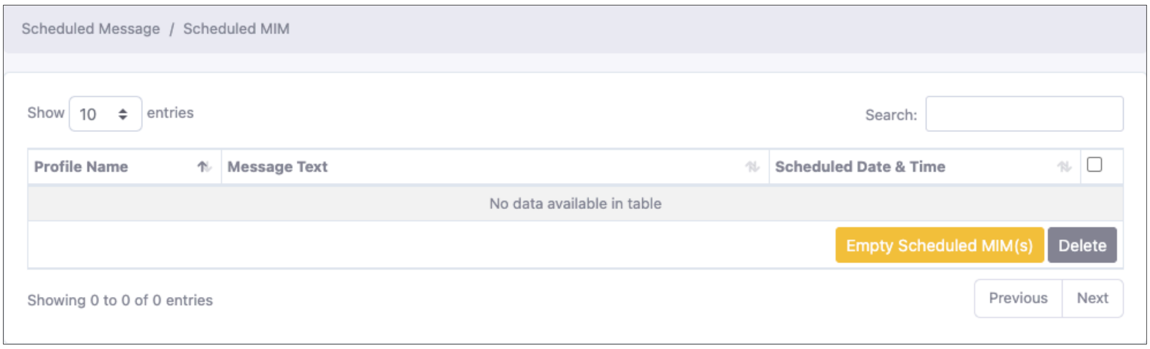

Figure 8-2: Scheduled MIM

9.0 Conversation

This page allows you to manage all your 2-way chats in one place. You may view and reply any ongoing conversations. The page auto-refreshes every minute.

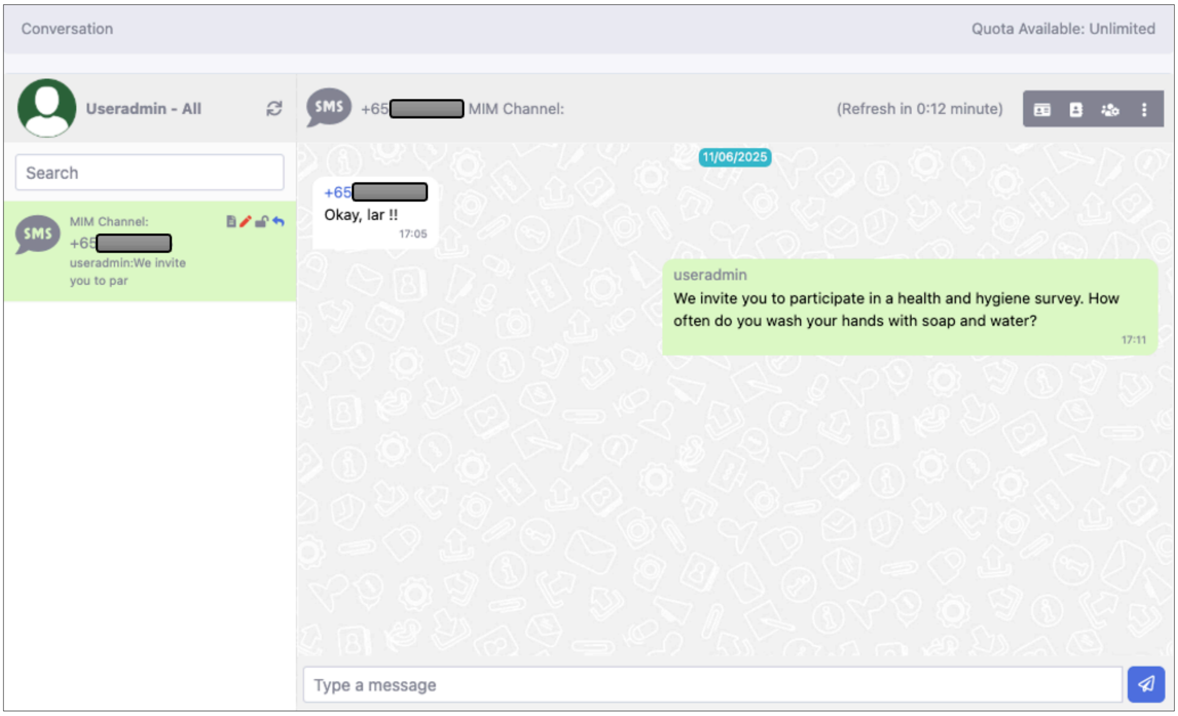

Figure 9-1: Sample Conversation

10.0 Unsubscribe List

The Unsubscribe List is a mobile phone list where the sender has requested not to receive any messages from the SendQuick system. The mobile phone numbers can be inserted by sending a SMS to the system with the unsubscribe keyword in the message. ***Keyword is defined as the first word in the SMS message, followed by a space.*** E.g., unsub<space>john where "unsub" is the keyword and "john" is the name of subscriber (optional).

If the number is removed from the unsubscribe list, it will receive SMS from SendQuick. Otherwise, these phone numbers are filtered before messages are sent. This filter list applies to all users in the system.

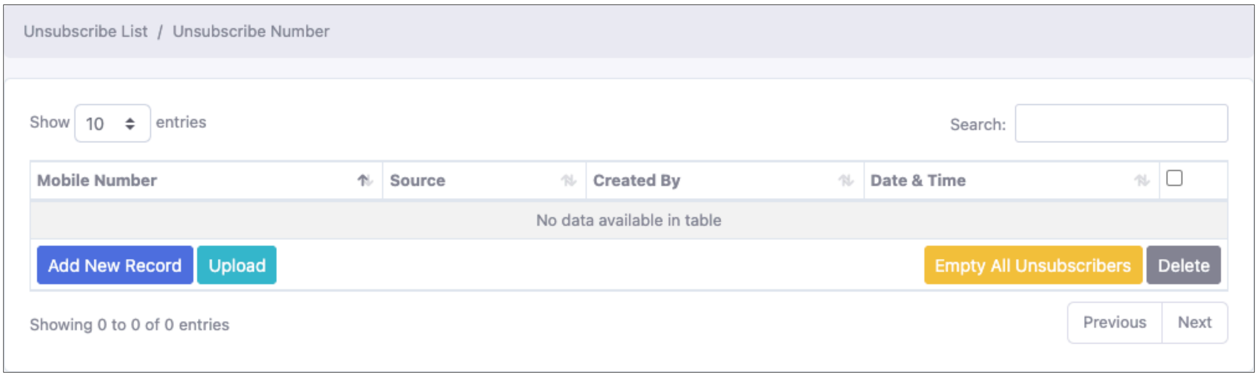

Figure 10-1: Unsubscribe Number

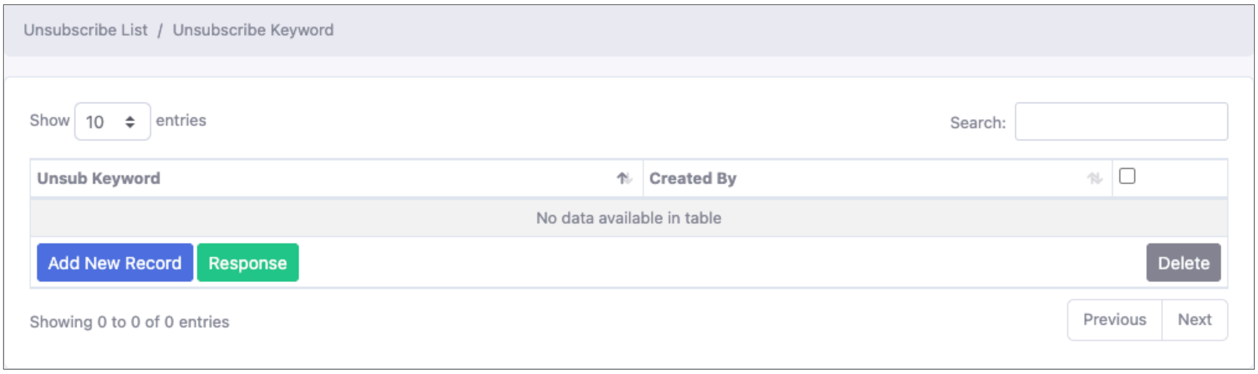

Figure 10-2: Unsubscribe Keyword

11.0 Common Inbox

In SendQuick, each user is automatically assigned a keyword. Keyword is defined as the first word in the incoming SMS message. The login username is automatically a keyword in the system. Other keywords can be defined in the Keyword Management section.

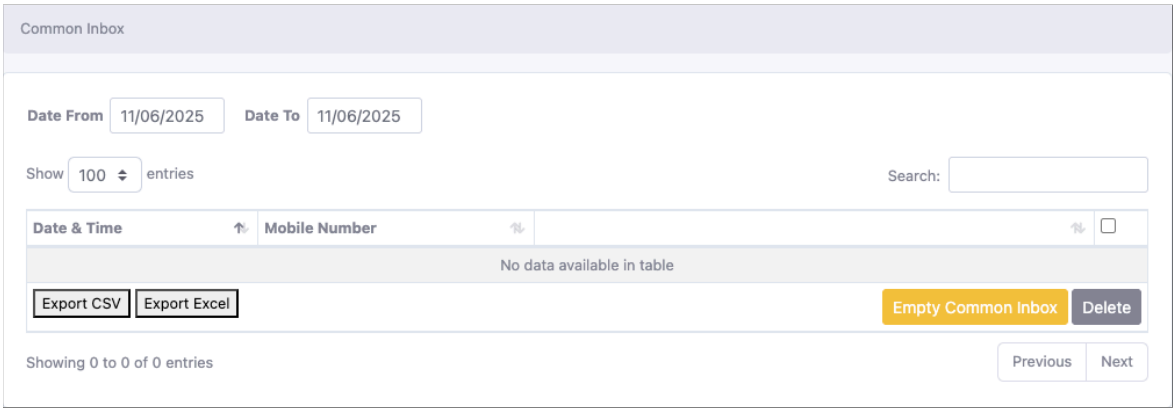

Figure 11-1: Common Inbox

If an incoming SMS match the keyword list, the SMS will be deposited in the respective user Inbox and only the user can read the message. The incoming SMS that does not have a keyword will be deposited in the Common Inbox and can be read by all users.

12.0 Message Logs Management

Message Logs has all the records of the SMS messages sent and received by SendQuick. There are two types of messages recorded in SendQuick:

- Personal Logs
- Global Logs

In each category, there are four sets of logs:

Types of Logs	Description
Inbox	Inbox is for all incoming SMS. These are SMS received by the SendQuick
Sent	Outbox are for SMS messages sent by SendQuick.
Queue	Messages that are awaiting to send sent out or are in process
Unsent	Messages that failed to send

12.1 Personal Logs

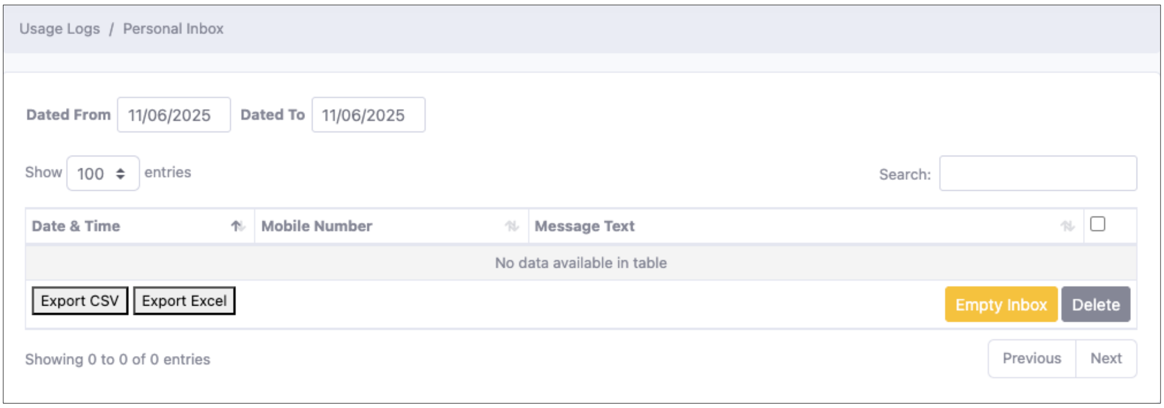

Figure 12-1: Personal Inbox

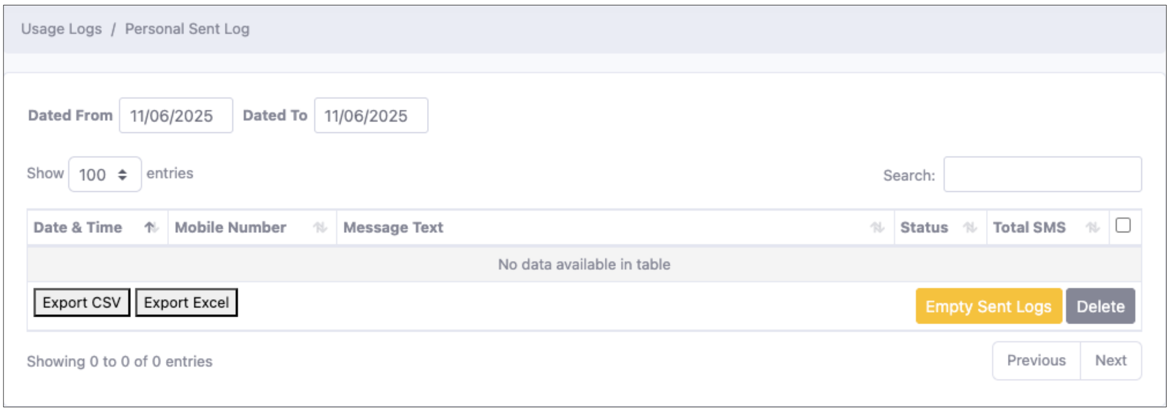

Figure 12-2: Personal Sent Log

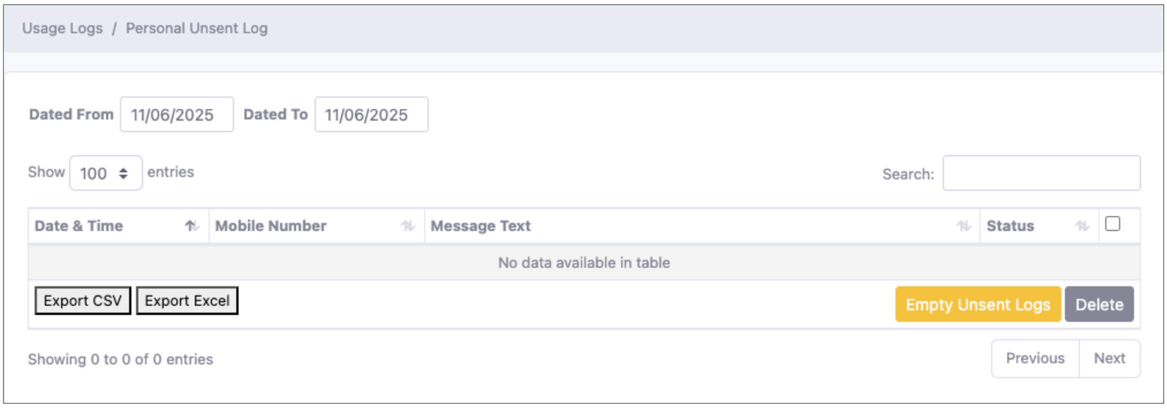

Figure 12-3: Personal Unsent Log

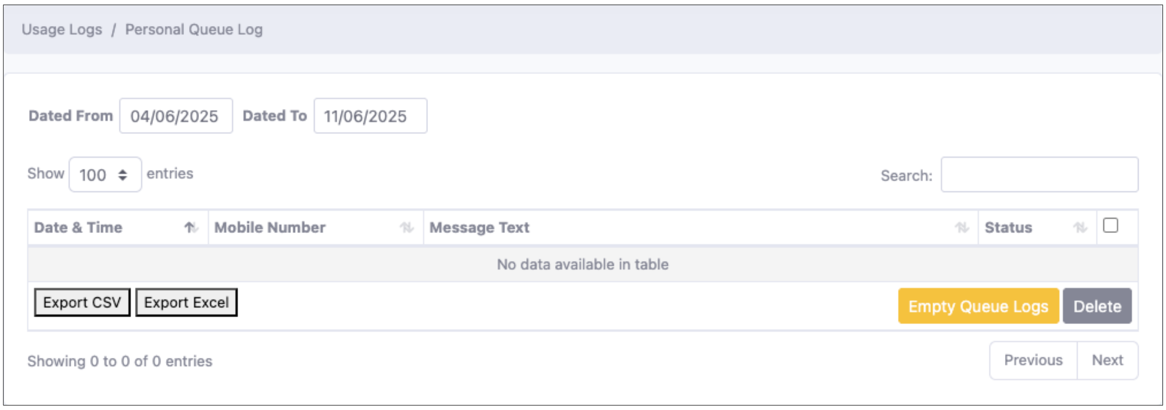

Figure 12-4: Personal Queue Log

12.2 Global Logs

Global Logs are logs for all the users in the SendQuick system. Global Logs may not be available to all users, depending on the access rights to the users.
The search fields for Global Logs more extensive, including keyword, user name, department, mobile number and date range

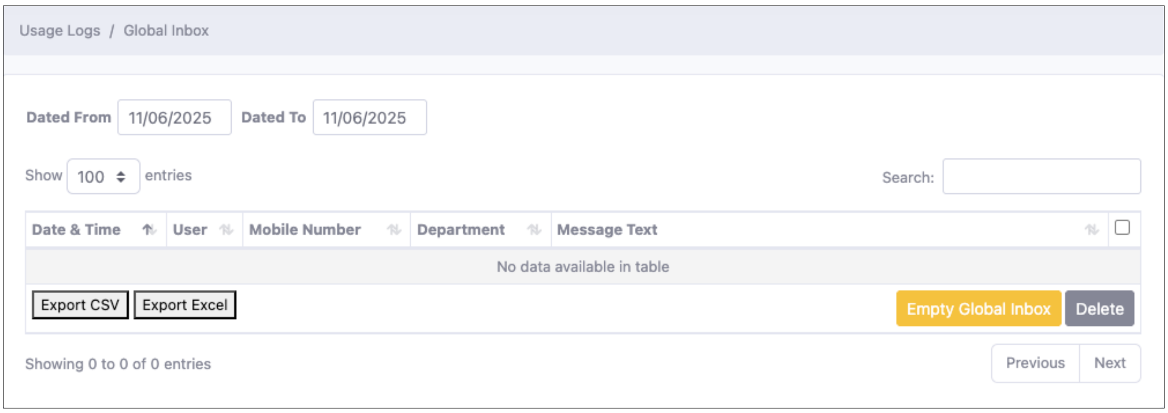

Figure 12-5: Global Inbox

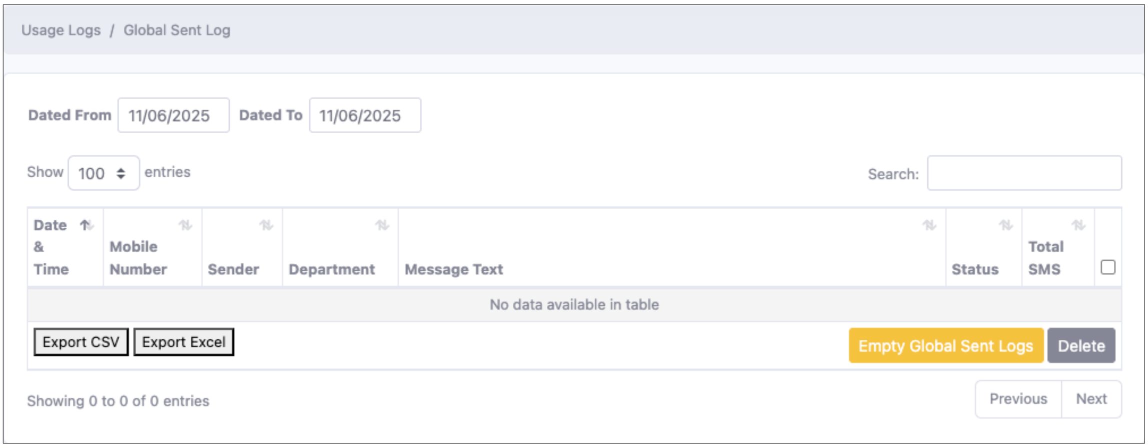

Figure 12-6: Global Sent Log

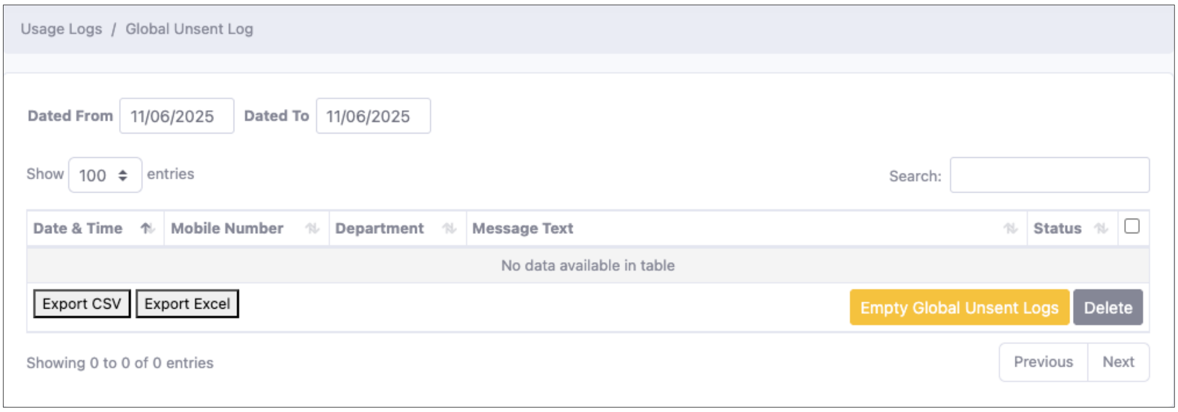

Figure 12-7: Global Unsent Log

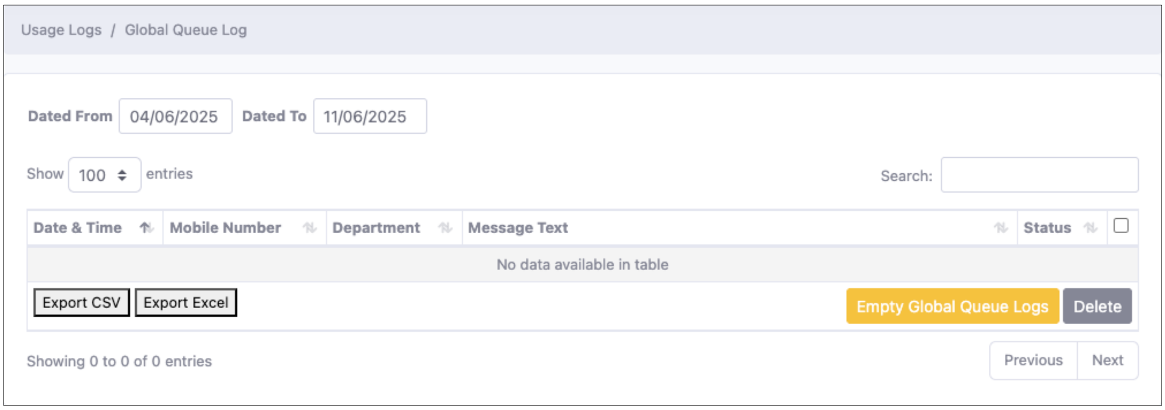

Figure 12-8: Global Queue Log

12.3 Email Logs

This page is for tracking the logs for any emails sent out via the *SMS & Email* send mode of the Send SMS page. Various filtering options are available, such as indicating a date range, and a search bar. You may export the logs as either CSV or Excel by clicking on the corresponding buttons at the bottom of the list.

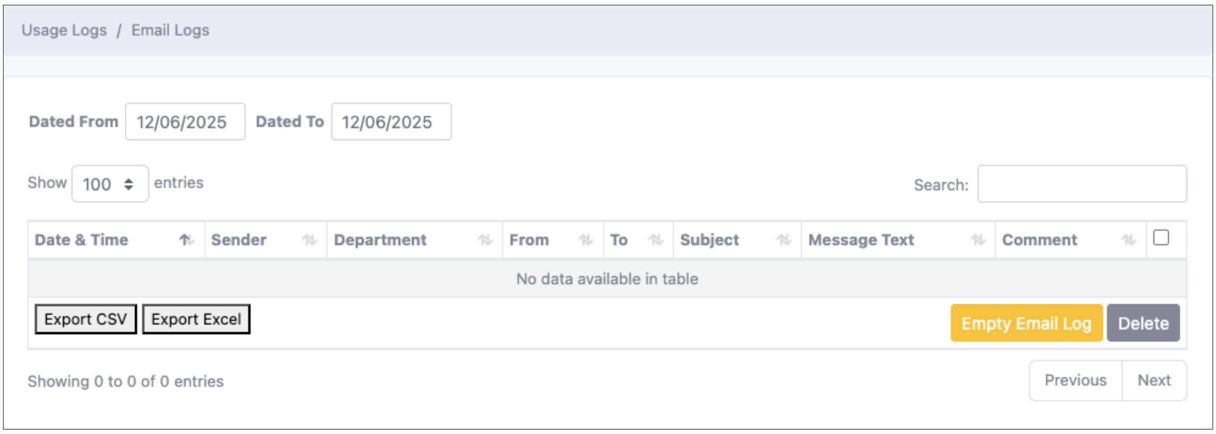

Figure 12-9: Email Logs

12.4 Broadcast Log

This page is for tracking the logs for broadcasted messages. Various filtering options are available, such as indicating a date range, and a search bar.

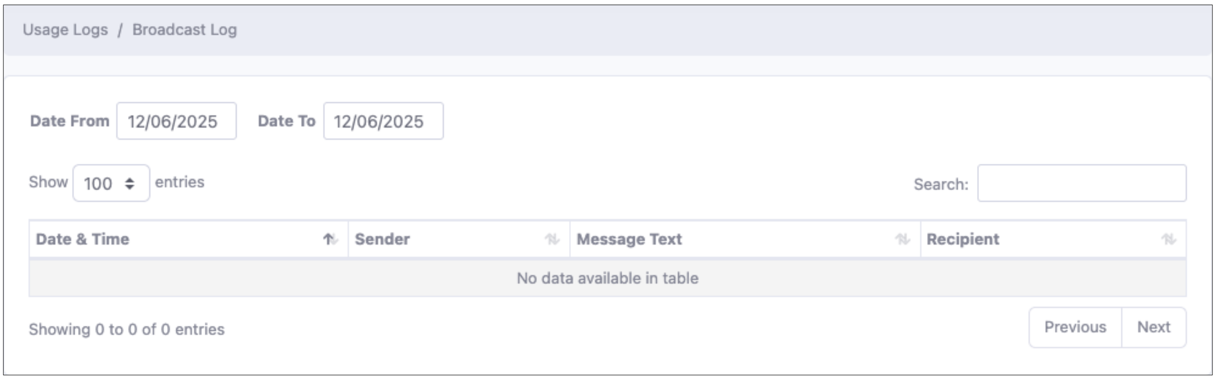

Figure 12-10: Broadcast Log

12.5 Usage Statistics

You can track various logs in this page, depending on the value set in the **Type** dropdown. The values available for that field are **Reply (Common Inbox)**, **Sender (Sent & Common Inbox)**, **Modem Label (Sent & Common Inbox)**. By choosing one and clicking **Generate Report**, you can view the logs related to the selected value within the specified date range.

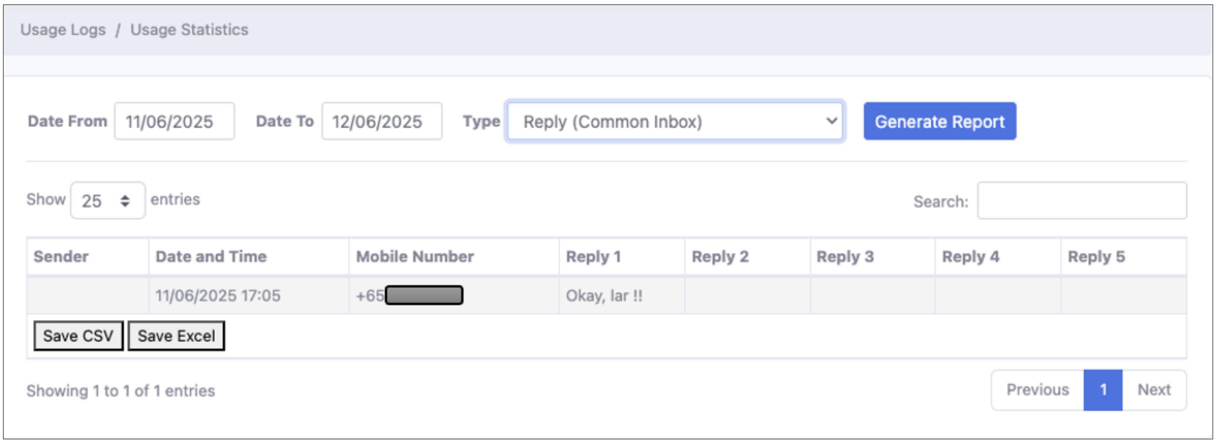

Figure 12-11: Usage Statistics

13.0 System Configuration

System Configuration allows the administrator to configure the global setting for sending SMS as well as some of the configuration of the system.

13.1 Maintenance & Report

This page is for configuring conversation maintenance and regular report intervals.

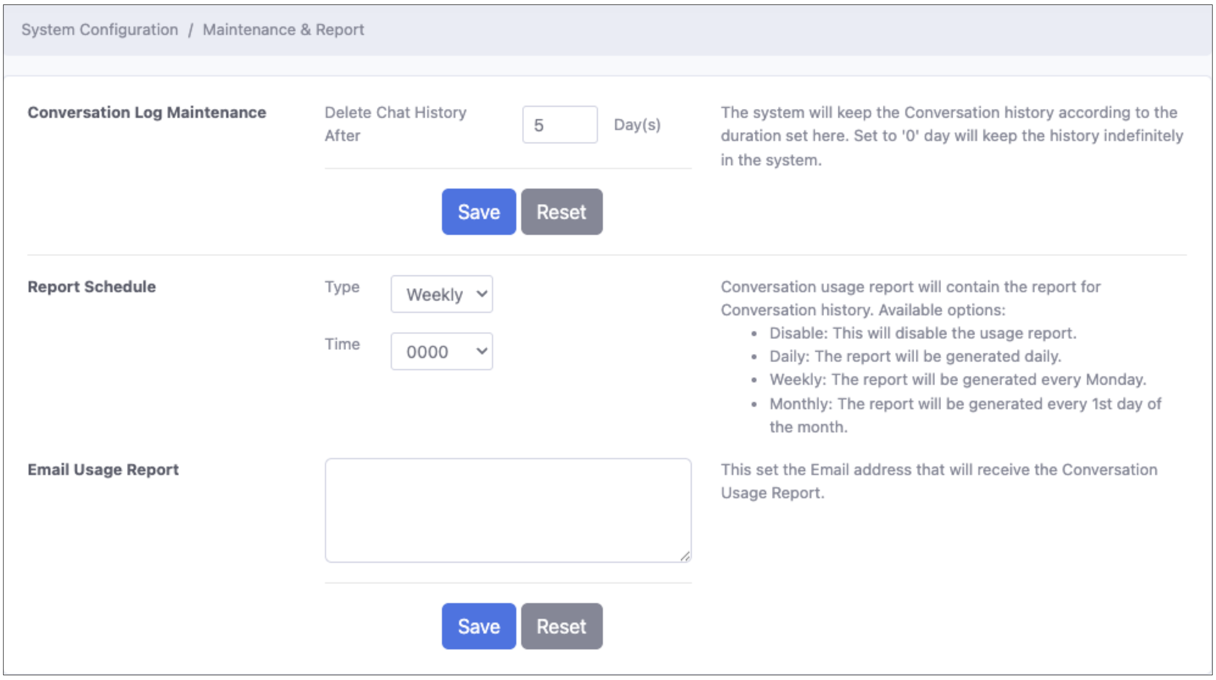

Figure 13-1: Maintenance & Report

The first section is for **Conversation Log Maintenance**. You can configure how often (in days) chat histories are cleared. To keep chat histories indefinitely, set the interval to be 0 days.

The second section is for report generation. Under **Report** Schedule, you can configure how often reports are generated and sent out. You may also set a specific time for these reports. The **Email Usage Report** textbox must be filled with emails you would like to have the reports sent to.

13.2 Sender ID Configuration

This page allows you to configure sender IDs you may want to use for sending your messages. These sender IDs can be configured to belong to specific Modem Labels or Departments.

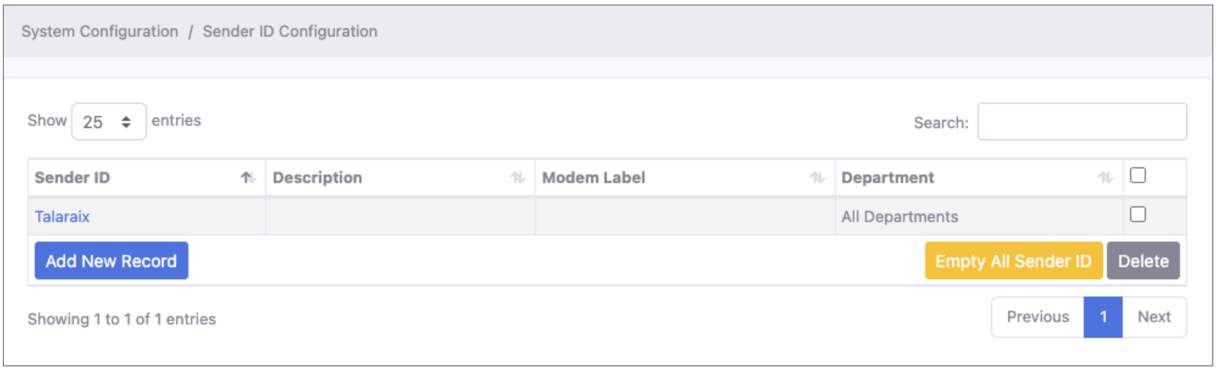

Figure 13-2: Sender ID Configuration

To configure a new sender ID, click on **Add New Record**, and fill the fields as required before clicking **Save**.

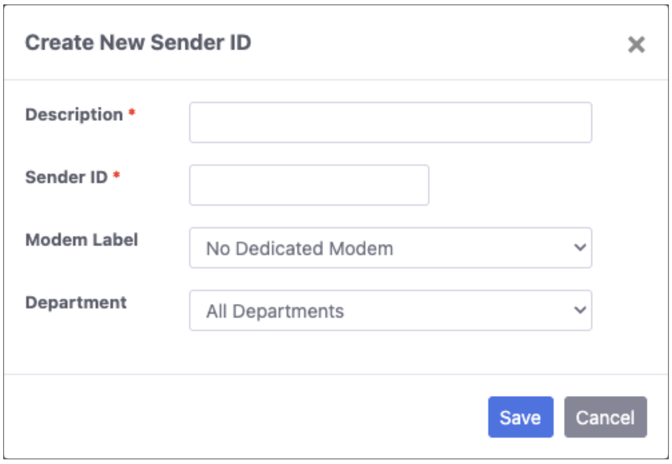

Figure 13-3: Create New Sender ID

13.3 Modem Configuration

This page allows you to manage Modem Label to Department assignment. Departments can be assigned specific modem labels. All SMSs sent by the department's user will use their department's assigned label.

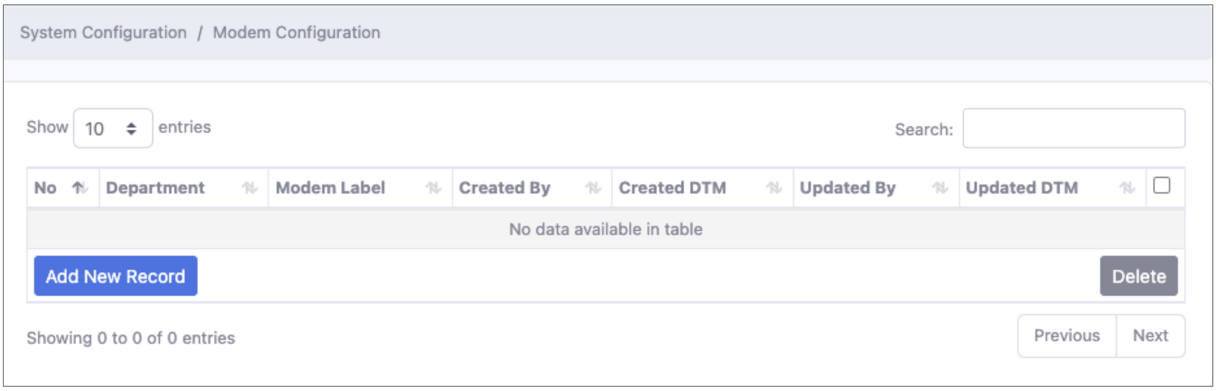

Figure 13-4: Modem Configuration

To add a new assignment, click on **Add New Record**, choose the desired department and modem label, then click **Save**.

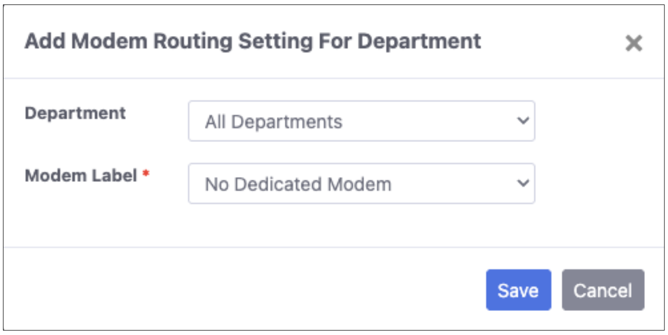

Figure 13-5: Add Modem Routing Setting for Department

13.4 SMS Time Configuration

The following figure shows the **SMS Time Configuration**. The settings here allows the company to define the **time range for each day** when SMS message can be sent from the SendQuick Messaging Interface. If messages are unsent by the expiry of the time range, the messages will be 'held' and sent on the next available time period.

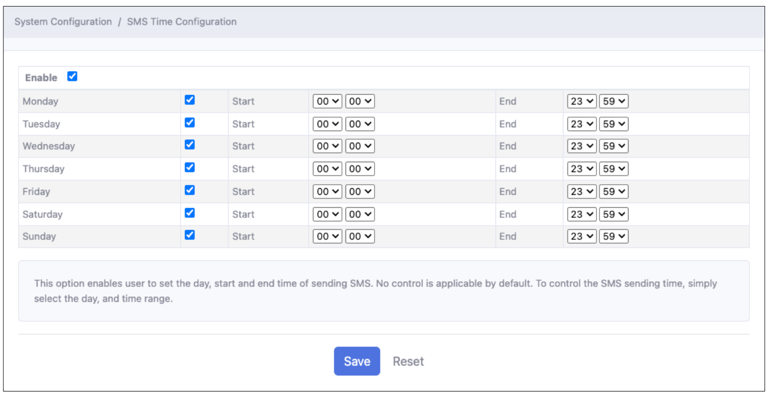

Figure 13-6: SMS Time Configurations

13.5 LDAP Server Management

This page allows you to manage LDAP Server connections.

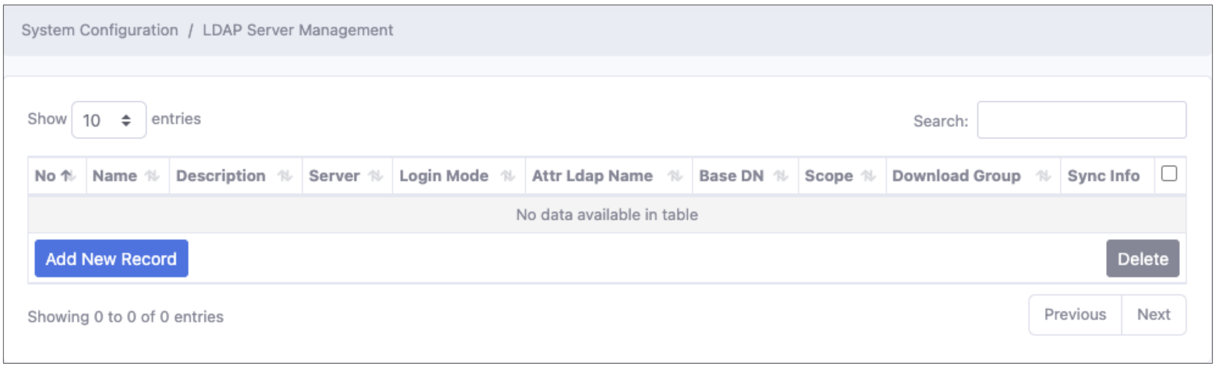

Figure 13-7: LDAP Server Management

To add a new LDAP Server, click on **Add New Record**, fill the fields as required, then click **Save** when you are ready.

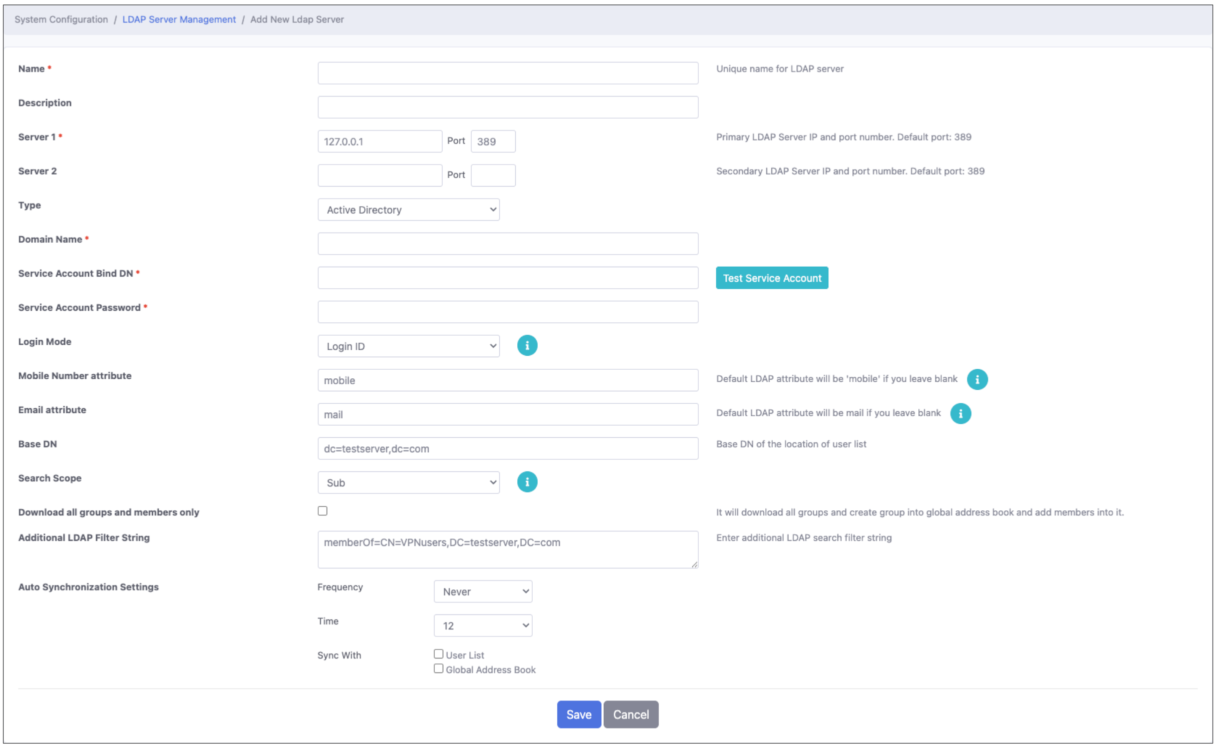

Figure 13-8: Add New LDAP Server

13.6 Web Interface Logo

The following feature in Figure 13-9 is **Web Interface Logo**. It is to allow the administrator to upload an image (eg, company's logo) that will be inserted before the SendQuick logo at the header banner. Just browse, select and Upload the file.

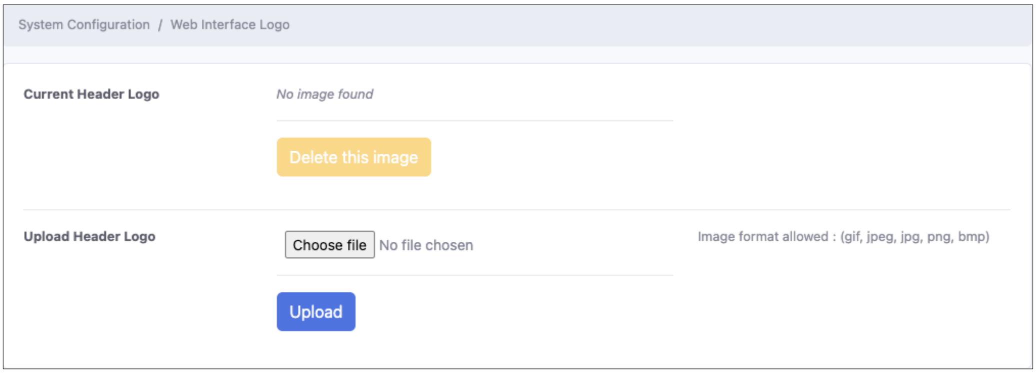

Figure 13-9: Web Interface Logo

14.0 Quota Management

Quotas are credits where each user is allocated a certain number of messages which can be used to send SMS. Quota does not apply to incoming (received) SMS. A user can only send the number of SMS, limited by the quota value. A summary of users and quota is shown.

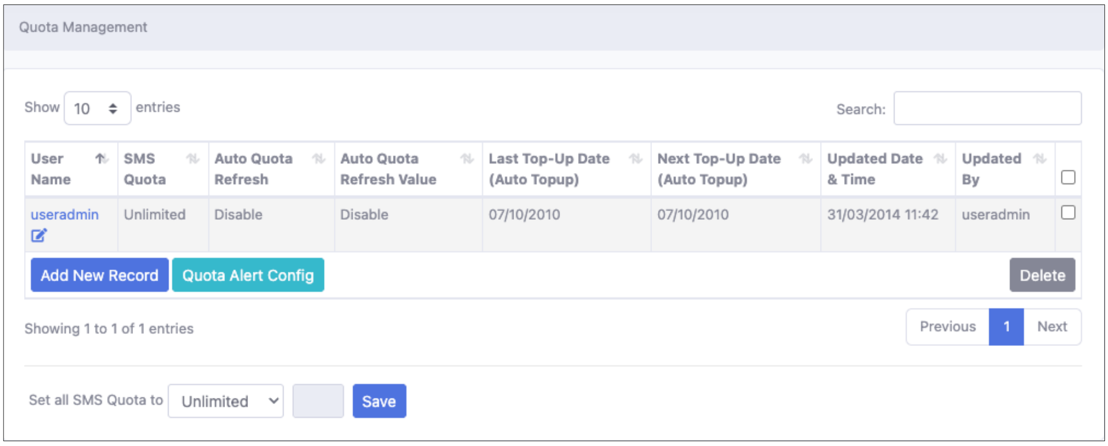

Figure 14-1: Quota Management

When a new user a created, the quota is created at the same time. However, if it is not created, the administrator can select **Add New Record** and select the **UserID** (username), **SMS Quota**, **Auto Quota Refresh** and **Auto Quota Refresh Value** and select **Save.**

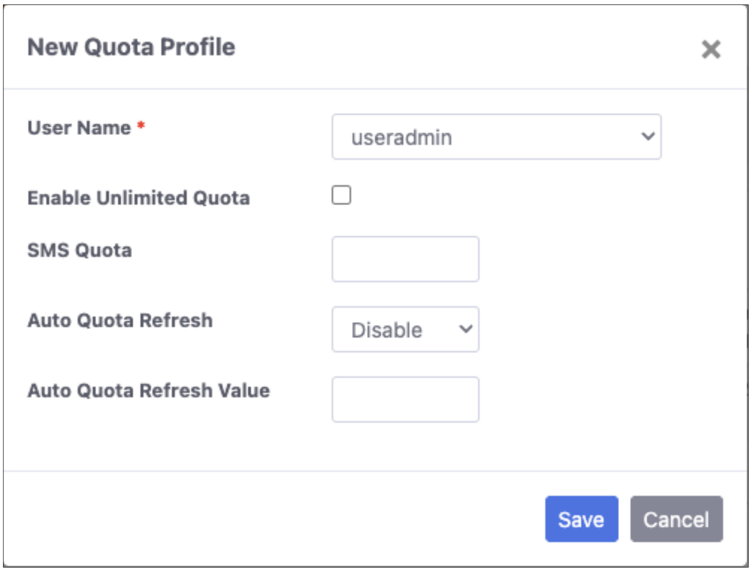

Figure 14-2: Create New Quota Profile

The administrator can Edit and Top-Up the credit manually.

Figure 13-3 shows the email address that will receive a notification when the credit value is low and reached a triggering point, which is configurable.

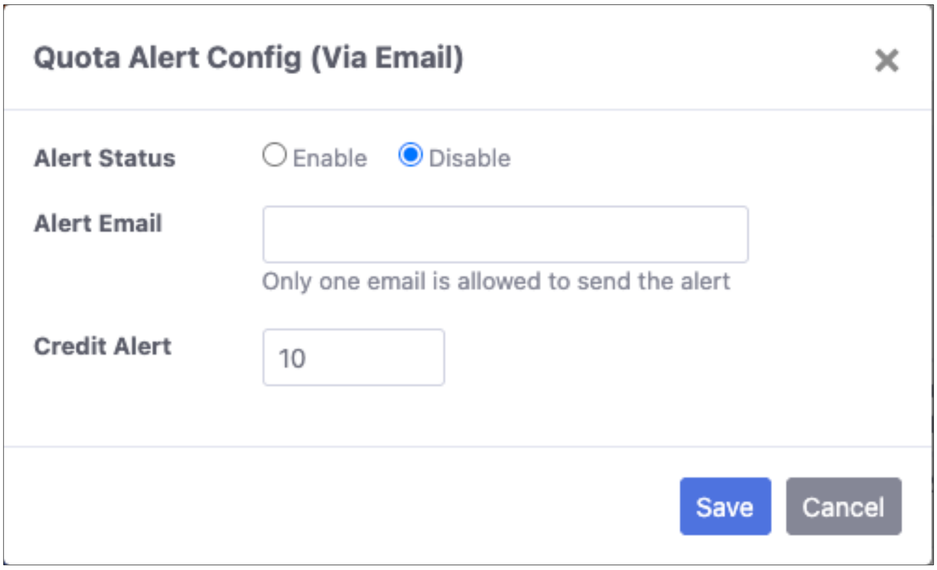

Figure 14-3: Quota Alert Configuration

15.0 Keyword Management

Keyword is defined is the first word in the incoming (received) SMS message. The keyword management is used to configure the routing and functions of the incoming SMS message. This is useful to convert and direct the incoming SMS to different supported formats (e.g., email, HTTP Post) to integrate to different backend applications. This is useful for data collation into backend applications automatically.

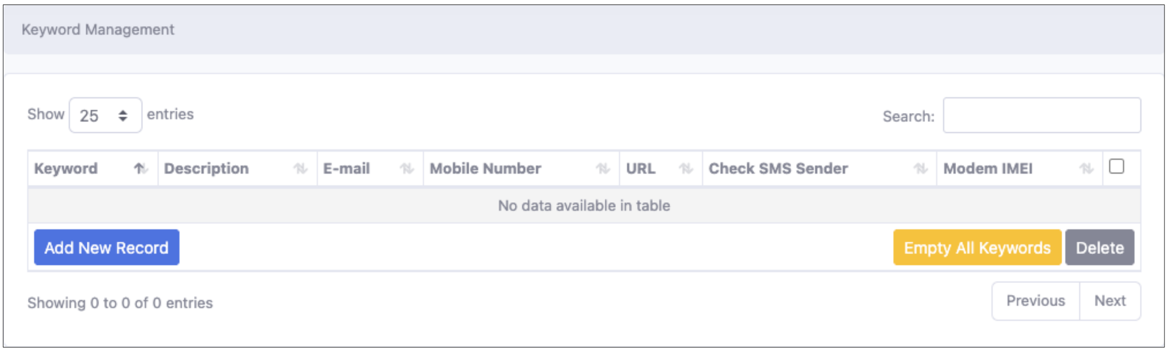

Figure 15-1: Keyword Management

This documents all the keywords assigned in the system. Keywords are unique and consists of alphanumeric characters, up to 15 characters. There are no space or special characters in the keyword.

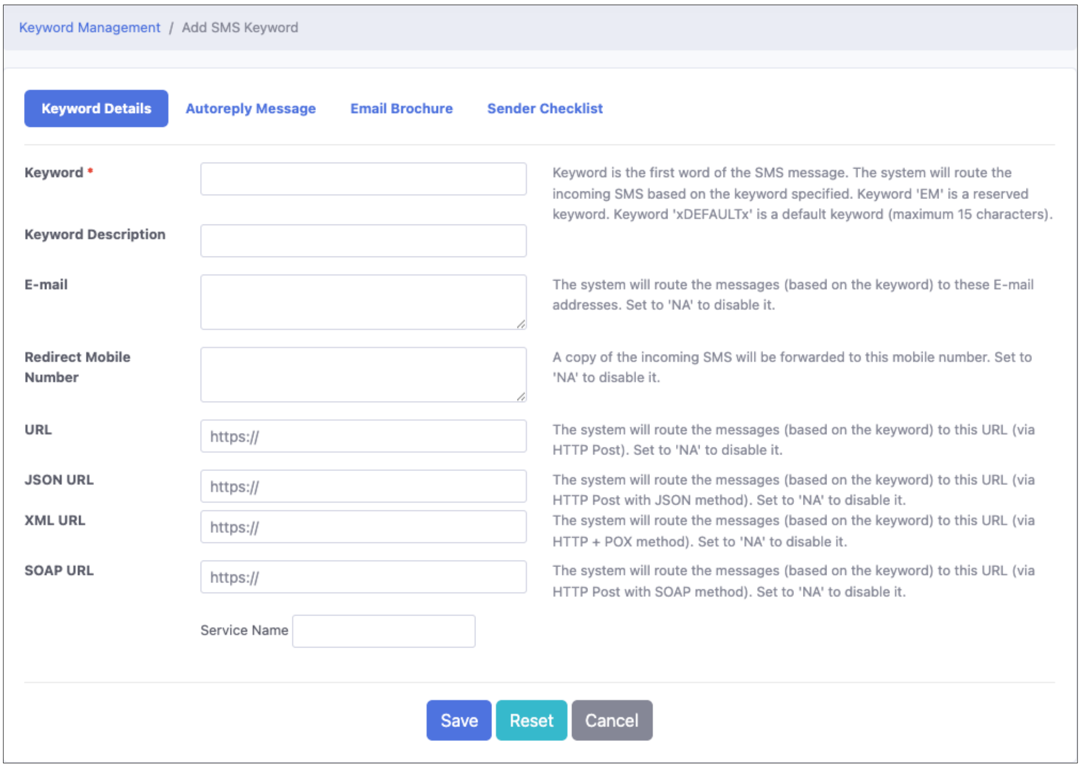

Figure 15-2: Keyword Management – Keyword Details

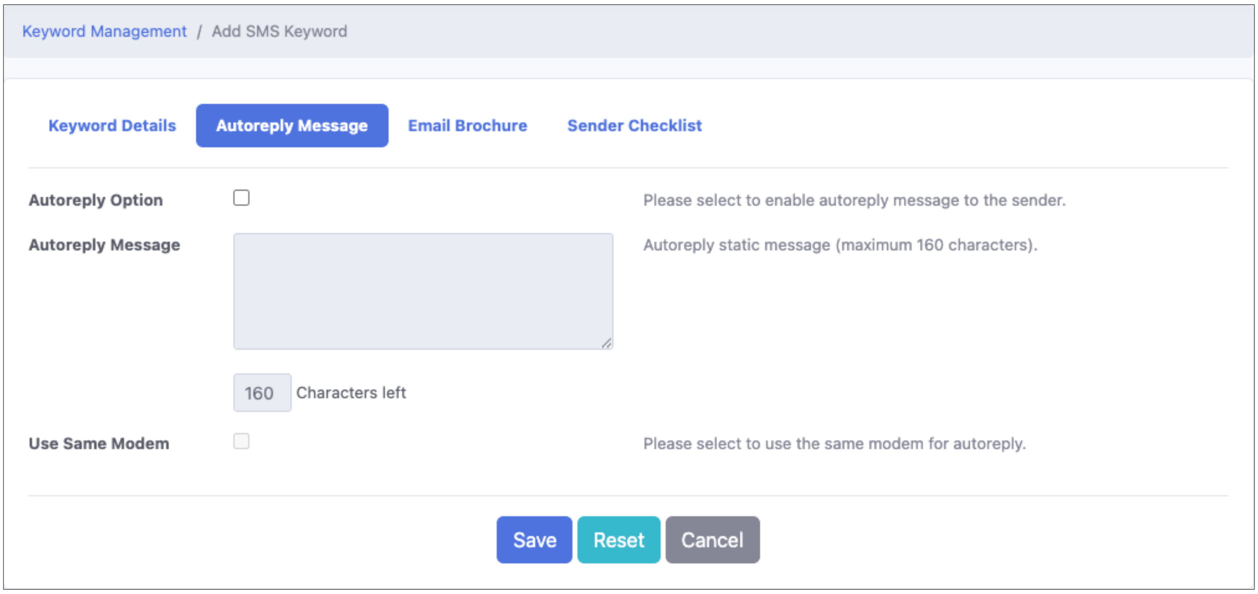

Figure 15-3: Keyword Management – Autoreply Message

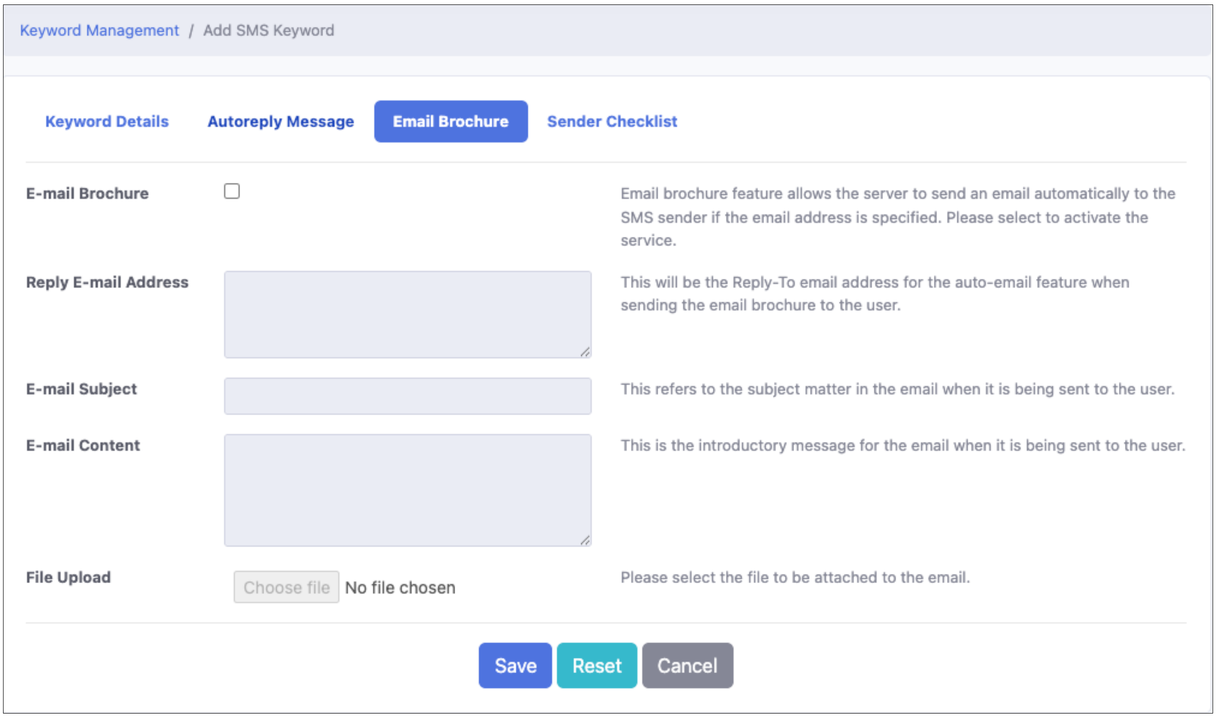

Figure 15-4: Keyword Management – Email Brochure

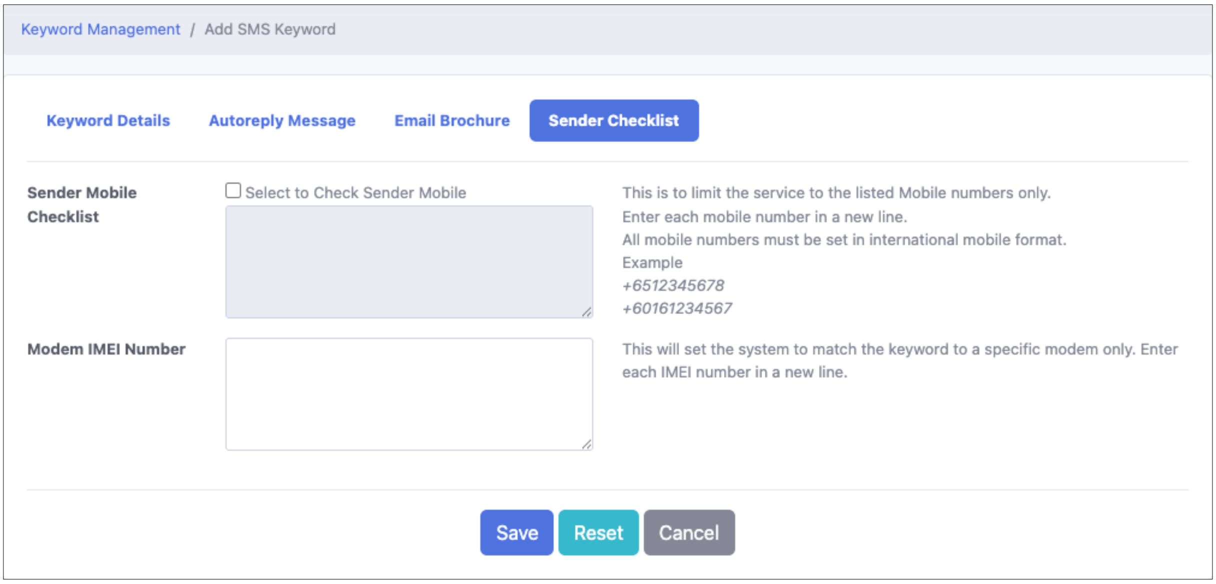

Figure 15-5: Keyword Management – Sender Checklist

The explanation for each function in a keyword as below:

Item	Description
Keyword	The assigned keyword (first word in SMS text message)
Keyword Description	The description for the keyword
Email	Insert email address in the text box (one line, one email). The incoming SMS will be converted to emails, and sent to these email addresses listed in the text box
Redirect Mobile Number	Insert mobile number to receive SMS. The incoming SMS will be redirected to these mobile numbers
URL	Insert the receiving URL: for HTTP Post. The incoming SMS will be converted to HTTP Post and sent to the URL listed. Refer to SendQuick API for HTTP Post specifications.
XML URL	Insert the receiving URL: for XML receipt. The incoming SMS will be converted to XML and sent to the URL listed. Refer to SendQuick API for HTTP Post specifications.
SOAP URL	Insert the receiving URL: for SOAP request The incoming SMS will be converted to SOAP request and sent a request to the URL listed. Refer to SendQuick API for HTTP Post specifications.
JSON URL	Insert the receiving URL: for JSON request. The incoming SMS will be converted to JSON string and send a request URL listed. Refer to SendQuick API for HTTP Post specifications.
Autoreply Message	Select (check) to activate an autoreply. This will send a response SMS to the sender
Autoreply Message	The message that will be sent in the auto-reply message

Use Same Modem	Select to use the same modem for autoreply
E-mail Brochure	Select (check) to trigger an automated email if there is an email address in the SMS message
Reply E-mail Address	The originating email address for the email
E-mail Subject	The subject for the email
E-mail Content	The actual email content to be sent
File Upload	If the email comes with an attachment, the file is uploaded here
Sender Mobile Checklist	This is to restrict the incoming SMS to designated mobile number only. Only mobile number listed in the text box is allowed to trigger the various functions (eg, email, XML, HTTP Post, JSON)
Modem IMEI Number	This will set the system to match the keyword to a specific modem only. Enter each IMEI number in a new line.

Once the Keyword is set, select **Save** and it will be saved and shown in the Keyword Management Summary.

16.0 Language Setup

SendQuick support multi-lingual web interface. To change the language, just click **Change Language** in the dropdown menu under your account name in the top-right hand corner.

Figure 16-1: Language Setup

The default language is English. User can select between Traditional or Simplified Chinese. Once selected, the interface will change to the desired language.