# Detailed instructions for the desktop application

Welcome to Sage SMS. This product can vastly improve your business communications and save you money! Our SMS Software enables you to send messages to your customers, suppliers and employees, as well as all the names in your personal Microsoft Outlook and from custom built lists. Contact directly via cell-phones to these names is one of the most effective means of enabling you to communicate with your customers and suppliers directly from your software package. Cell-phones are far more pervasive than email, SMS messages are relatively cheap, and technological developments will make this form of communication highly effective in terms of speed of delivery and cost-effectiveness. In addition a cell-phone is a personal item and contact via a cell-phone (albeit SMS) is a personal contact.

## Key Information

### Understanding Sage SMS - Using the online help

The on-line help provides you with an electronic reference to all the features of Sage SMS. This software is very simple to use and operate, it will save you time and money. Sage SMS Terminology

- SMS An SMS message is a Short Message Service which can be sent in not more than 160 characters to a Cell / Mobile telephone. In the case of our software it is sent from a desktop application via the Internet to a Cell / Mobile telephone.
- Desktop Is a Personal Computer (PC) possibly connected to other computers on a Local Area Network (LAN). In the case of our software the desktop must have access to Internet connectivity.
- Hub Our Sage Pastel SMS system uses a site on the Internet to verify and forward all your SMS messages, we call this our Value Added Services Hub.
- Batch One or more SMS messages to be sent in one process from the desktop to the Hub and on to the cell / mobile telephones.
- Return SMS An SMS response to your SMS message. Return SMS messages are linked directly to the customer / supplier / outlook name / contact and to the actual message sent.

### Working in Sage SMS - Registering Online for the Sage Pastel SMS service

In order to activate the Sage SMS you need to register and purchase an SMS contract online. You can choose the number of SMS messages that you wish to purchase from a number of options. You must purchase a contract with a minimum 3-month validity. At any point during the contract period you can purchase an additional contract, which carries over existing unused SMS messages and extends the contract period. During registration you can set up as many desktop users as you choose, the desktop application can then be installed on all the individual users desktops.
Upon completion of registration you will be emailed all your details for setting up your users.

### Setting up the user's desktop

Install the software on as many desktops as you wish within your organization, the software is free! You can install the software by running the set-up kit, which can be downloaded from our site. When you start Sage SMS, click on File and then Setup. The following screen is then available for setting up of once-off information.

- Email Software: Select the email package used by this desktop. This will enable names and details to be extracted from the email package directly into the SMS software.
- Accounting Software: Select the Accounting Software package from which customer and supplier details will be automatically extracted to enable the sending of SMS messages.
- Company ID, User Name and Password: Once you have purchased an SMS contract, you will be issued with a Company ID and a user id and password for all the users you have registered. Enter these details in order to communicate with the SMS sending software.
- Email ID: Enter the user's email id.

### How to send SMS messages

Once the set-up is complete and you have registered online you are able to send SMS messages. Depending on what you have activated during set-up, you can send messages using the data from a number of sources.

### Messages to Customers in your Accounting Software
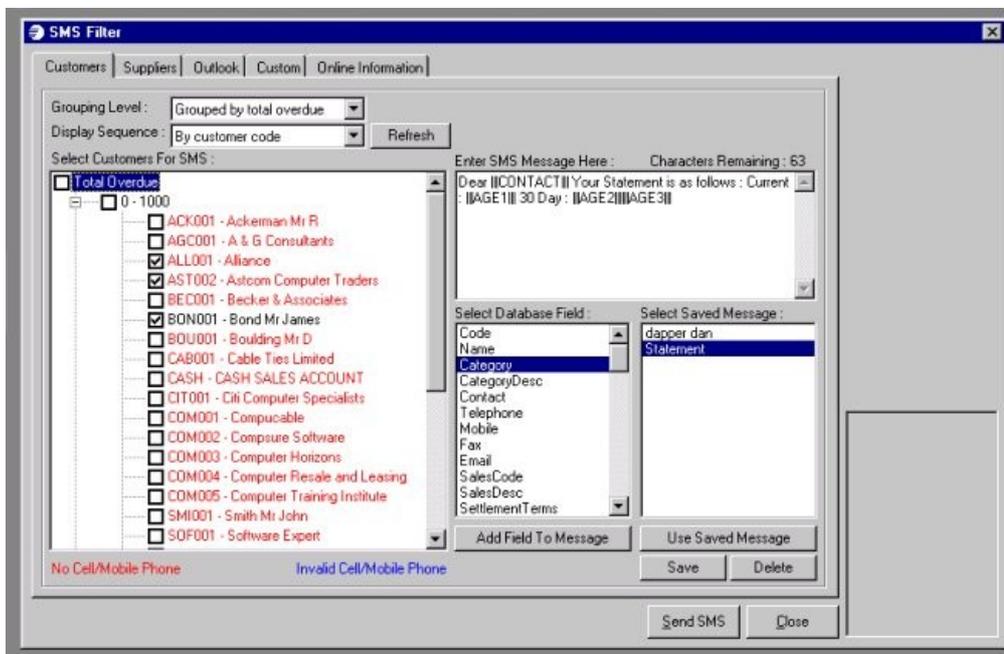
- Select the grouping level you wish to view customers in, and then press the refresh button. This will display a tree view of the customers and you can then mark those to whom you wish to send SMS messages

- Enter the SMS message, you can double-click on available database fields to include these in the message. Note that the available characters is reduced as you increase the size of your message.

- Save message formats for later use, if you wish to retrieve a message format simply double-click the message and it will be selected for sending.

- To view a customers complete details, simply double-click on the customer name.

- Send the SMS messages to the selected customers by clicking the Send SMS button. Please note that you must be connected to the Internet when you click this button.

- Once you have clicked to send messages a sending status is displayed.

## Messages to Suppliers in your Accounting Software
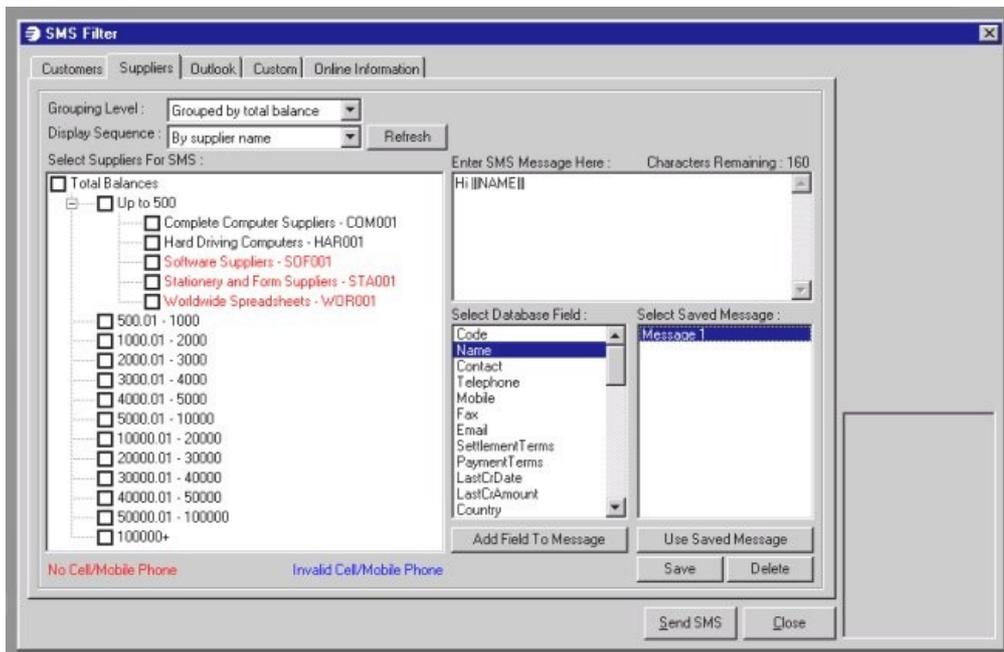


- Select the grouping level you wish to view suppliers in, and then press the refresh button. This will display a tree view of the suppliers and you can then mark those to whom you wish to send SMS messages

- Enter the SMS message, you can double-click on available database fields to include these in the message. Note that the available characters is reduced as you increase the size of your message.

- Save message formats for later use, if you wish to retrieve a message format simply double-click the message and it will be selected for

sending.

- To view a suppliers complete details, simply double-click on the supplier name.

- Send the SMS messages to the selected suppliers by clicking the Send SMS button. Please note that you must be connected to the Internet when you click this button.

- Once you have clicked to send messages a sending status is displayed.
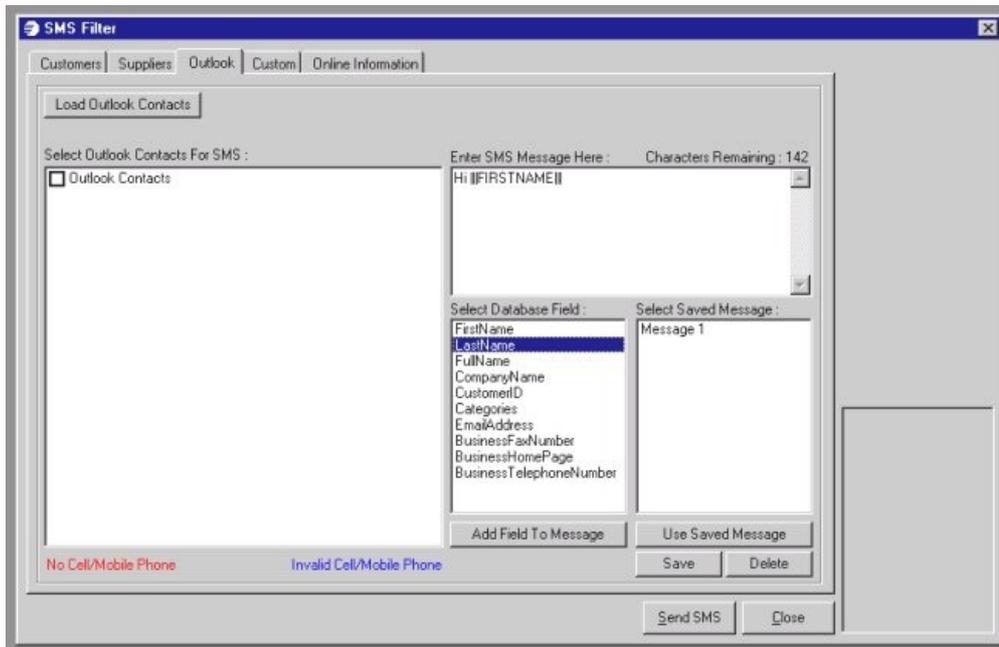


- Press the Load Outlook Customers button to create a tree view of the contacts in your personal Microsoft Outlook. Select the contacts you wish to SMS by clicking on the square node for the contact.

- Create your SMS message as before using available database fields where necessary.

- Click Send SMS to batch all messages and send these.

## Messages to Ad-Hoc names and lists imported in CSV format
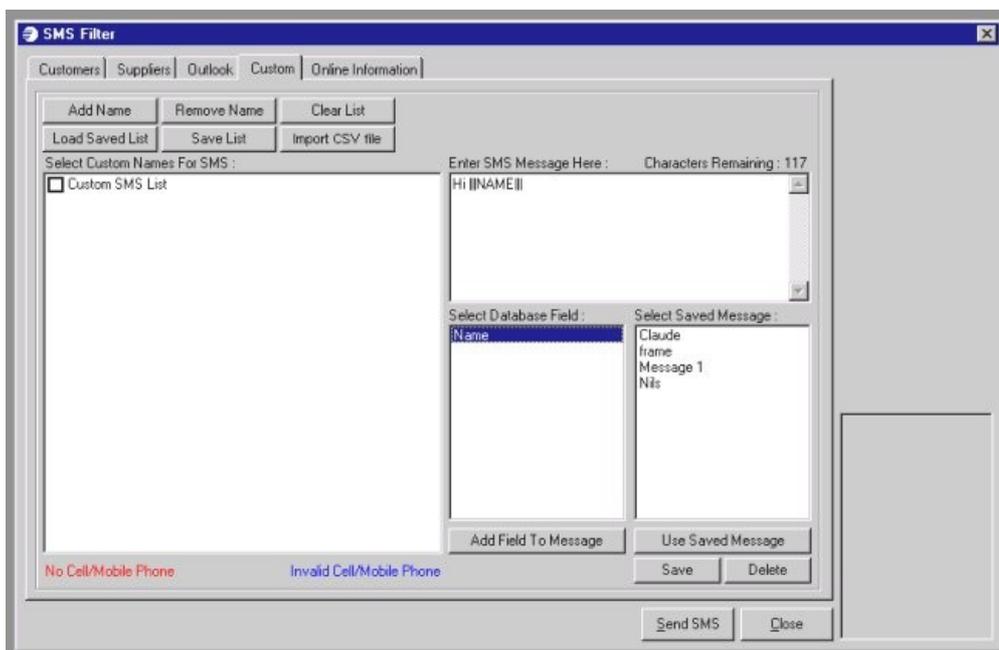


- This screen allows you to enter or load names and numbers from a number of sources. You can click Add Names to insert ad-hoc names into your list.

- You can save lists with a specific name and reload these at a later stage.

- You can import lists from a CSV file. A CSV file is a comma separated file format that you can save your data in from Microsoft Excel. Note that the CSV file can have as many columns as you require, however the first 2 must be the Name column and the Cellphone

column. In addition the columns must be named. You will then be able to use all the column fields as database fields to insert into the message you create and send.