

GoldSMS for Goldmine Installation and User Guide

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What is ActivSMS used for

Introduction

ActivSMS allows you to send SMS messages to a single contact or group within Goldmine.

This utility allows you to use text message templates you have previously setup and to insert GoldMine fields into the text messages. It allows you to record the messages that have been sent in the contact's history. It also allows you to specify whom the text message is from (number or name) when sending the text message.

In defining a group you can also identify Primary (contact in top half of the record) and/or Additional contacts (contacts under the contacts tab) to be included in your group; further refine your choice using merge codes on both an include and exclude basis.

Installing ActivSMS for GoldMine

Below is a step by step guide for making ActivSMS available in Goldmine and connecting it to the database.

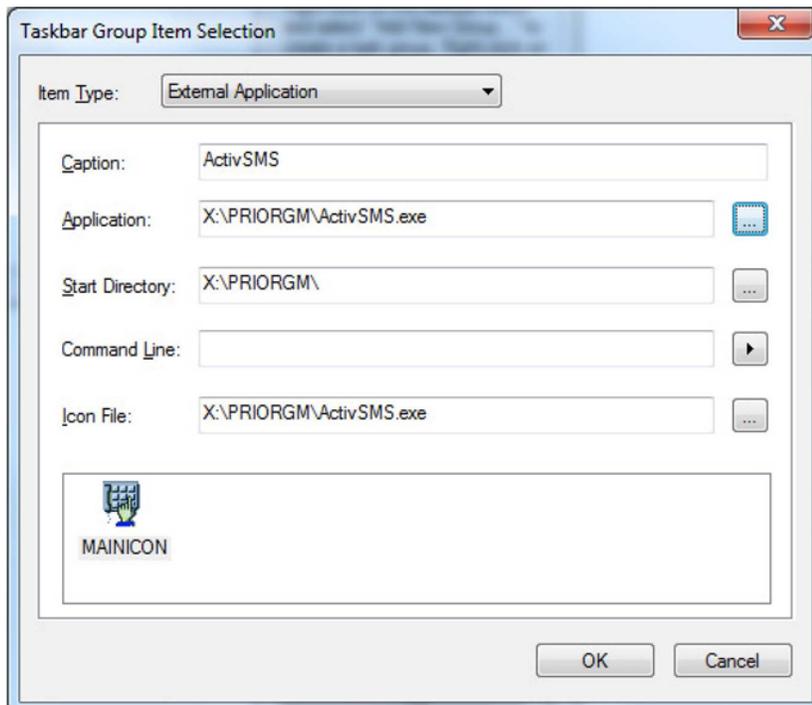
Installing ActivSMS

The installation process is just a case of placing the ActivSMS.exe in the correct location.

1. Extract the ActivSMS.exe file from the provided zip file.
2. Copy the extracted ActivSMS.exe to the GoldMine directory on your server/network installation.

Adding ActivSMS to the GoldMine Taskbar

1. Start GoldMine and login as a user with rights to alter the Taskbar.
2. If the Taskbar is not visible go to the Window menu and select Taskbar. Click Customize.
3. Right click the Taskbar and select add new item.
4. The Taskbar group item selection window will appear.
5. From the item select box select external application.
6. Fill in the application text box to set the display text for the application E.G. Send SMS.
7. Click on the icon next to the Application box and browse to the Activsms.exe.
8. The other boxes will automatically fill in, click OK to finish.



Starting ActivSMS for the first time

The first time you start ActivSMS you will need to establish a connection to GoldMine.

Setting up the GoldMine connection

1. Log in to GoldMine using a user with Master access.
2. Open ActivSMS through the shortcut you created on the Taskbar earlier.
3. A dialog will appear asking if you always want to connect to the open GoldMine database. Select Yes or No, if you select Yes then the connection is set and there is nothing further to do.
4. If you select No, it will ask you for your GoldMine settings. See the GoldMine Configuration section in ActivSMS Setup for more details.
5. The Register Program dialog box will appear. Enter the activation code supplied when you purchased the program.

N.B. The setting up of the GoldMine connection will only happen once, when it is complete you will not be prompted again. The Code is annual and will expire, you will be warned 7 days prior to expiry to allow you to re-purchase.

Preparing to use ActivSMS

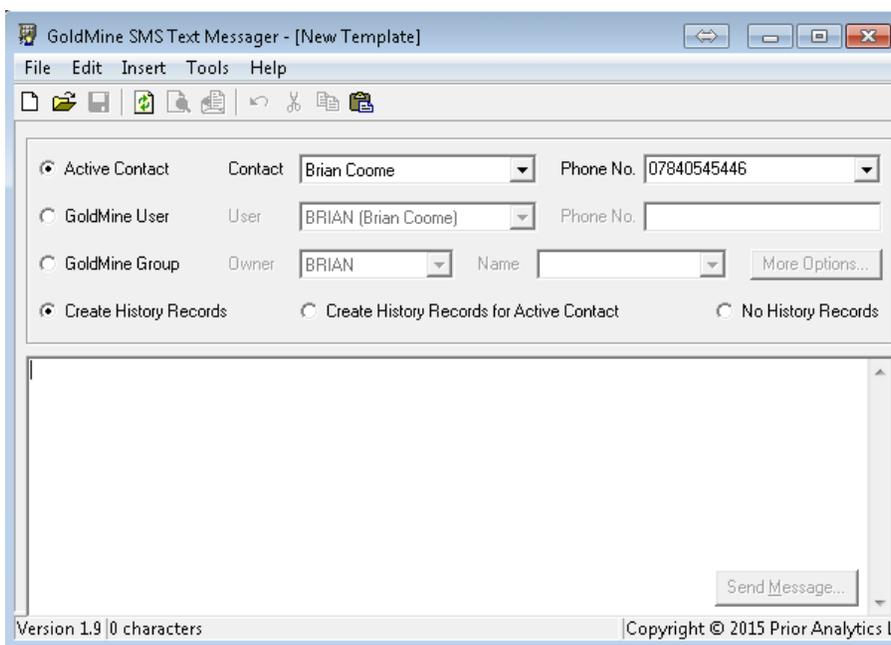
It is possible to send an SMS message to your entire database but it's more likely you will want to send to an individual contact or a group of contacts. To send to a group of contacts you use a

GoldMine filter or group. Using GoldMine build a filter or group with the criteria you've chosen. For further information on this, see further details in the GoldMine user guide on creating Filters and Groups.

Starting ActivSMS

1. Launch GoldMine and login as normal.
2. Launch ActivSMS from the button you placed on the Taskbar.

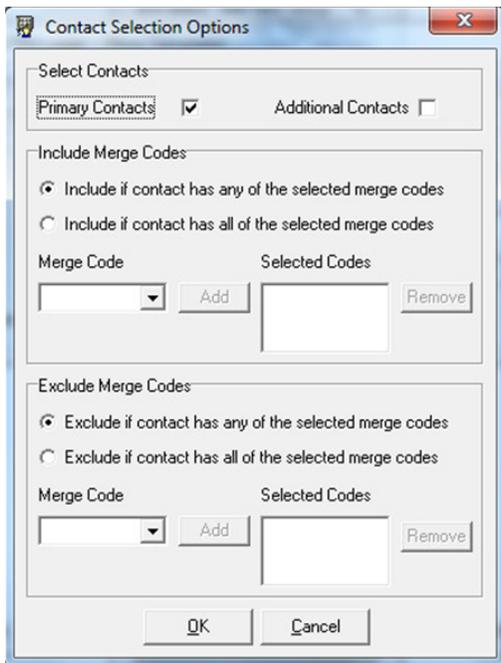
The GoldMine SMS Text Message window will appear.



Selecting SMS Recipients

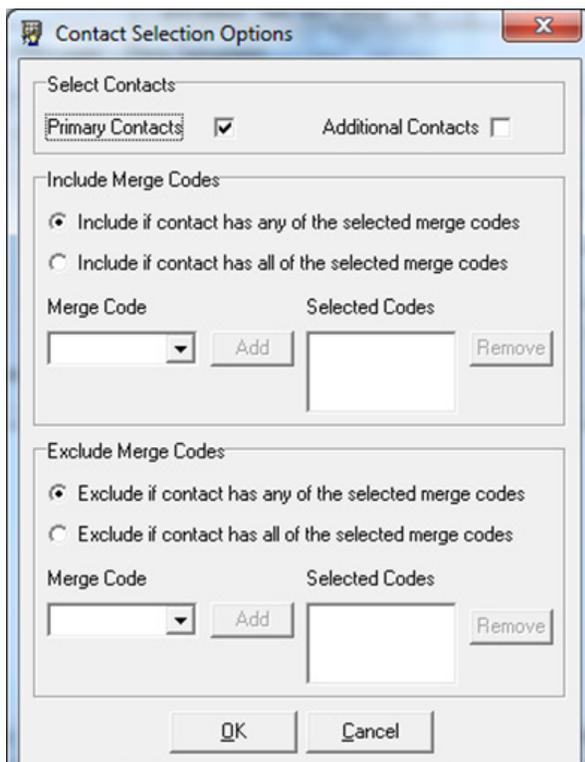
To Send a Text Message to a Single Contact

1. From the top part of the window, select Active Contact to send the text message to a single contact, you will need to have opened the correct contact card in GoldMine.
2. The Primary contact is selected by default. To select an additional contact click on the Contact drop down box.
3. The mobile number of the primary contact is selected by default. To select another number, click on the Phone No. Drop down box. SMS messages generally can only be sent to mobile numbers.
4. You will also have the option to Create a History Record in GoldMine this is active by default, you can toggle this option with the radio buttons available on the application screen.



Sending an SMS Text Message to a Group of Contacts

1. From the top part of the window, select GoldMine Group to send the text message to a group of contacts.
2. Select Owner of the group and the Name of the group to send the message to from the drop down boxes.
3. To further refine your group click on the 'More Options' button, the contact selection options screen will appear.

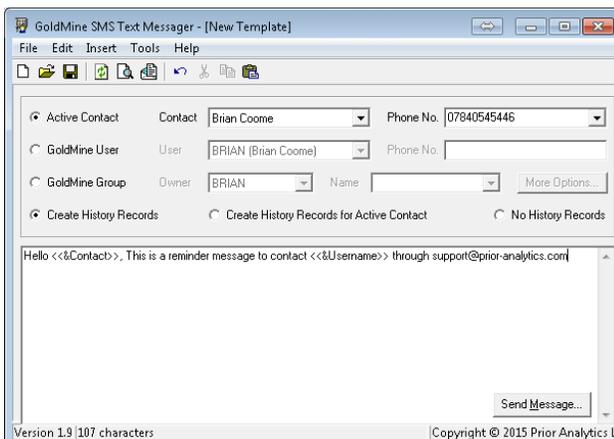


4. Select required options, tick both Primary or Additional contacts or one or the other depending on who you wish to message.
5. You then have the option to select to Include merge codes, select the codes you wish to include from the drop down list and add to the selection. Then decide if you wish to include contacts with all the codes or any of the codes.
6. You can also select merge codes to exclude, this has the same option as above, add the required codes and select the condition.
7. Once all options are as you require click 'OK' to return to the message sending screen the selected options will be set for the group of contacts.

Text Messaging

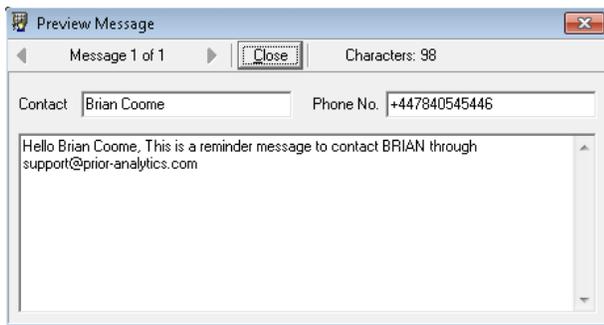
Creating a Text Message

To create the text message click in the text message entry window and type your required text, to personalize the messages to the contacts you can use the 'Insert' menu in the application to add fields from GoldMine such as contact name, or other details. Selected fields will appear in the message in a format of <<&field name>> this will be replaced with the correctly selected data from GoldMine on sending the message.



Previewing the Text Message

1. Select 'File', then 'Preview message' from the menu.
2. The Preview message window will appear.
3. To scroll through the other messages use the forward and backwards arrows.
4. Once happy with the messages click 'Close'



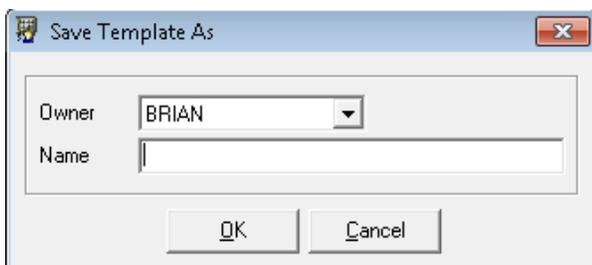
Now you can send the message, once sent a message sent successfully dialog will appear to confirm.

Using SMS Message Templates

Saving a Template

To save a message as a template, firstly follow the instructions in chapter 4 to create the message then you can save this as a template for future use.

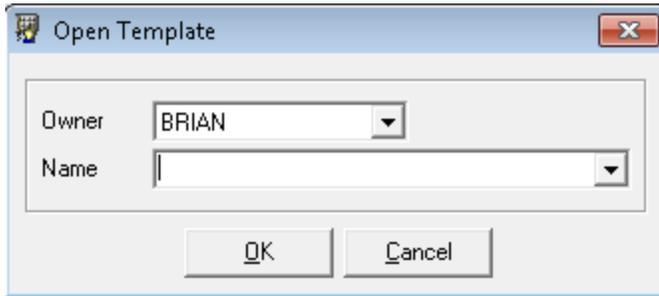
1. Click on the Save Message Icon on the toolbar.
2. The Save Message template window will appear, select the owner for the message from the GoldMine users list.
3. Name the template with a user friendly name that you will recognize.
4. Click 'OK' to save.



N.B. Saved templates are held in email templates in the Document Management center.

Using saved Templates

1. To use an existing template, click on the Open button on the toolbar. ActivSMS can use email templates from the Document Management Centre. Note: the email template selected must be in plain text format
2. Select the Owner of the Template from the drop down list
3. Select the template you want to use by name from the drop down list.
4. Click 'OK' to activate the selected template



SMS Program Settings

Personal Options

1. Select 'Tools' then 'Personal Options' from the Menus.
2. Select Name or Number option for how you wish the Message to be sent, you can send from a Name or Number this is how the recipient will receive the message (Limited to 11 characters).
3. Select the option for Prompt to save changes to messages, this allows the application to save changes you make to template messages or messages when you create new messages or exit the program.
4. Select Use own SMS account to charge the SMS message sent to your SMS account. Fill in the details for the API ID, Username and Password. Click on Test Connection to check the details.

Message Options

1. Select 'Tools' then 'Message Options' from the Menus.
2. Select Create history items for each message sent to record messages sent in contact's history. Enter an Activity Code and a Result Code if required.
3. To create a group of contacts that did not receive the SMS message, select Create Group... and type a name for the group in Group Reference.
4. Select Check network coverage... ActivSMS will check that there is adequate network coverage before attempting to send messages
5. Maximum Message Concatenation allows you to specify the maximum number of messages to split the text into and send.
6. Enter the Country Code in the Default International Code.

The 'Personal Options' dialog box is titled 'Personal Options' and contains the following settings:

- Send From Number (with an empty text field)
- Send From Name (with an empty text field)
- Prompt to save changes to messages
- Close automatically after sending messages
- Use own SMS account
- API ID: 3151591
- Username: Crmuk100
- Password: [REDACTED]
- Buttons: Test Connection, Show Credit
- Bottom buttons: OK, Cancel

The 'Message Options' dialog box is titled 'Message Options' and contains the following settings:

- Primary Contact Mobile Field: CONTACT1.PHONE3
- Additional Contact Mobile Field: CONTSUPP.PHONE
- GoldMine User Mobile Field: Phone
- Create history item for each message sent (default setting)
- Activity Code: SMS, Result Code: SNT
- Reference: <<PhoneNumber>> sent <<message>>
- Record the Message ID in Notes (used for troubleshooting)
- Create group of contacts who couldn't receive message
- Group Reference: SMS Failed
- Check network coverage and credits charged per message
- Record delivery acknowledgements on SMS server
- Maximum Message Concatenation: 3 messages (465 chars)
- Default International Code: 44
- Bottom buttons: OK, Cancel

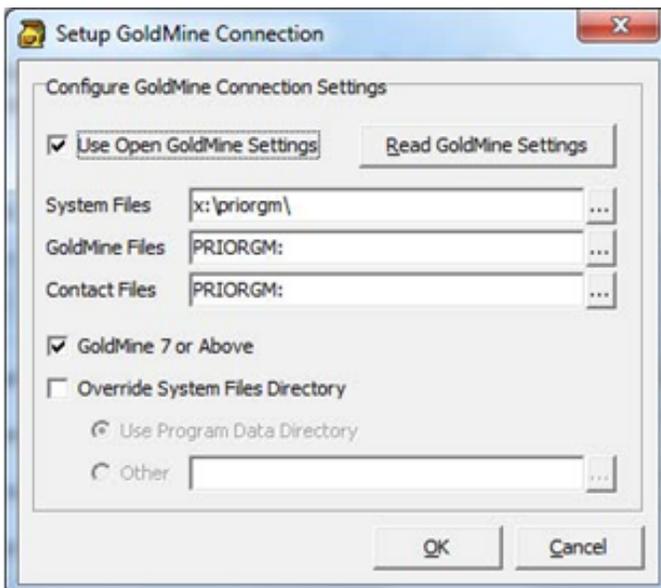
ActivSMS Setup

Activating ActivSMS

1. Start GoldMine and run ActivSMS.exe.
2. A dialog box appears asking for Activation code, enter the code provided, make sure it matches exactly the code that has been supplied.
3. Click 'OK' to complete activation, you will be prompted with a dialog box showing successful activation and number of days remaining on the license.

GoldMine Configuration

1. Start GoldMine and run ActivSMS.exe.
2. A dialog will appear asking if you always want to connect to the open GoldMine database. Select Yes or No. If you click yes then the connection is set, to set the connection manually click 'No'.
3. Configuration Section is for entering the details of the GoldMine server and database. An administrative GoldMine user is required to access GoldMine; therefore the standard MASTER user is suitable.

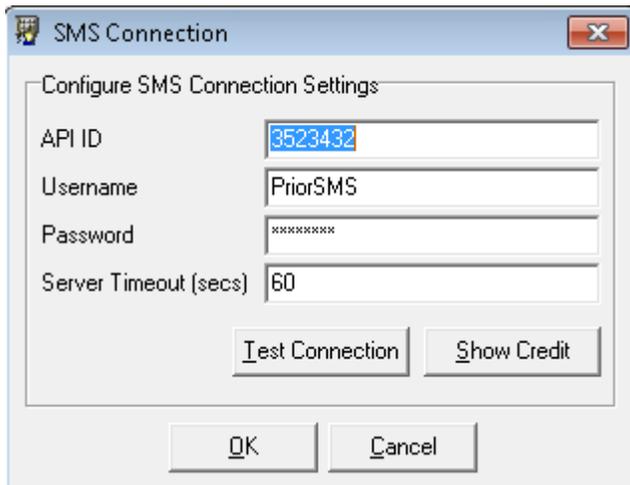


GoldMine Connection Configuration Screen

Configuration Item	Description
System Files	Location of the root GoldMine folder
GoldMine Files	Name of the BDE alias in use by GoldMine for connecting to the SQL database or the folder GoldMine GMBase files are stored in
Contact Files	Name of the BDE alias in use by GoldMine for connecting to the SQL database or the folder GoldMine Contact files are stored in

SMS Connection Configuration

1. Fill in the details for API ID, Username and Password (These are provided by Prior Analytics).
2. Click on Test connection to make sure the connection works.



The image shows a Windows-style dialog box titled "SMS Connection". It contains a section titled "Configure SMS Connection Settings" with four input fields: "API ID" (containing "3523432"), "Username" (containing "PriorSMS"), "Password" (containing "*****"), and "Server Timeout (secs)" (containing "60"). Below these fields are two buttons: "Test Connection" and "Show Credit". At the bottom of the dialog are "OK" and "Cancel" buttons.