

# User Guide

ActivSMS for GoldMine® 

Activip 

Your dedicated technology partner - developing solutions to extend your  
CRM implementation



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## ActivSMS

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## ActivSMS

### 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 set-up and to insert GoldMine fields into the text messages. It allows you to record that messages 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.

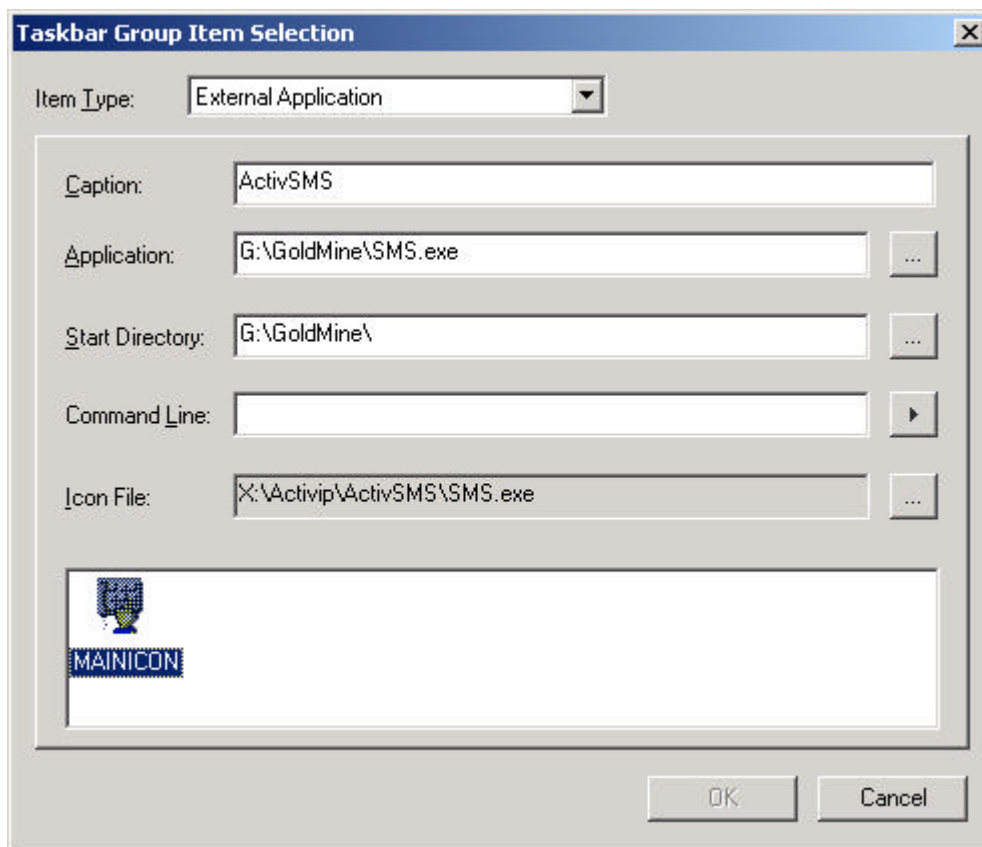
In defining a group you can also identify Primary (contact in top half of the record) and/or Additional contacts (contacts under the contacts tab) to be included in your group; further refine your choice using merge codes on both an include and exclude basis.



## Installing ActivSMS

### Adding ActivSMS to the Taskbar

1. Place the sms.exe in the GoldMine directory on your network.
2. If the Taskbar is not visible go to the **Window** menu and select **Taskbar**.
3. Right click in the **Taskbar** and select **Add New Item...**
4. The Taskbar Group Item Selection window will appear.
5. From the **Item Type** box select **External Application**.
6. Fill in the **Caption** box for the text to be displayed on the **Taskbar**.
7. Click on the  icon next to the **Application** box and browse to the sms.exe
8. The other boxes will fill automatically. Click on **OK**.





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## Setting up the GoldMine Connection

1. Log into GoldMine.
2. Open ActivSMS through the shortcut on the **Taskbar**.
3. A dialog box will appear asking if you always want to connect to the open GoldMine database. Select **Yes** or **No**.
  - a. If you select **Yes**, it will ask you for your GoldMine login name and password.
  - b. If you select **No**, it will ask you for your GoldMine settings. See the GoldMine Configuration section in ActivSMS Setup for more details.
4. The Register Program window will appear, enter your **activation code**.



## Preparing to use ActivSMS

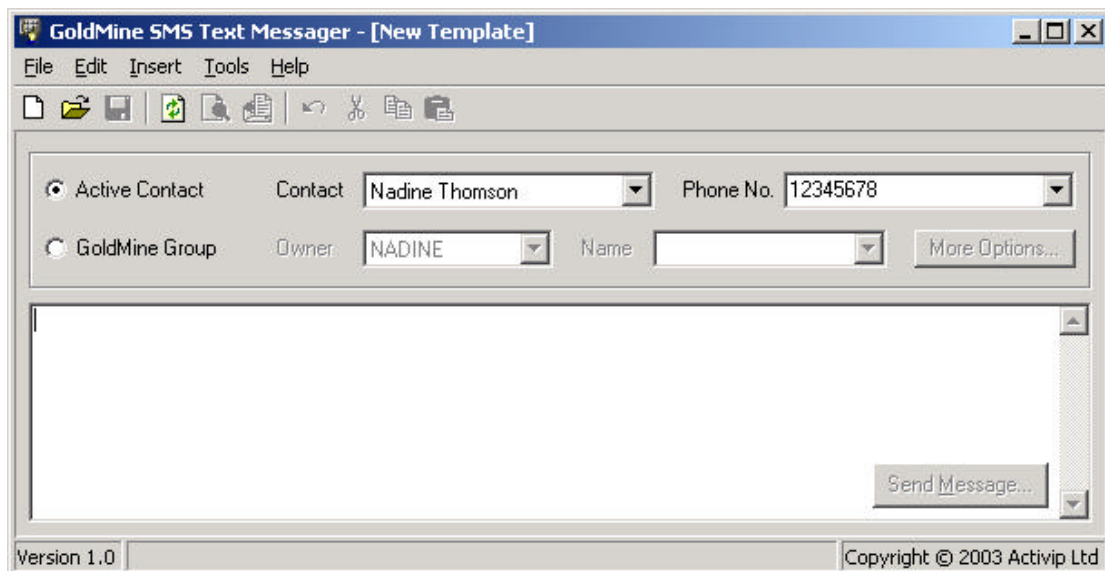
### Preparing your group

It is possible that you will want everyone in your database to receive your SMS message but it is more likely that you will want to select a target group. To do this, you should build a **group** using your chosen criteria. For further information on this, see the instruction sheet on creating Filters and Groups.

### Starting ActivSMS

Launch GoldMine and launch the ActivSMS program.

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.
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 mobile number, click on the **Phone No.** drop down box.

### To send a 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 window will appear.

**Contact Selection Options**

Select Contacts

Primary Contacts  Additional Contacts

Include Merge Codes

Include if contact has any of the selected merge codes  
 Include if contact has all of the selected merge codes

Merge Code Selected Codes

Add  Remove

Exclude Merge Codes

Exclude if contact has any of the selected merge codes  
 Exclude if contact has all of the selected merge codes

Merge Code Selected Codes

Add  Remove

OK Cancel



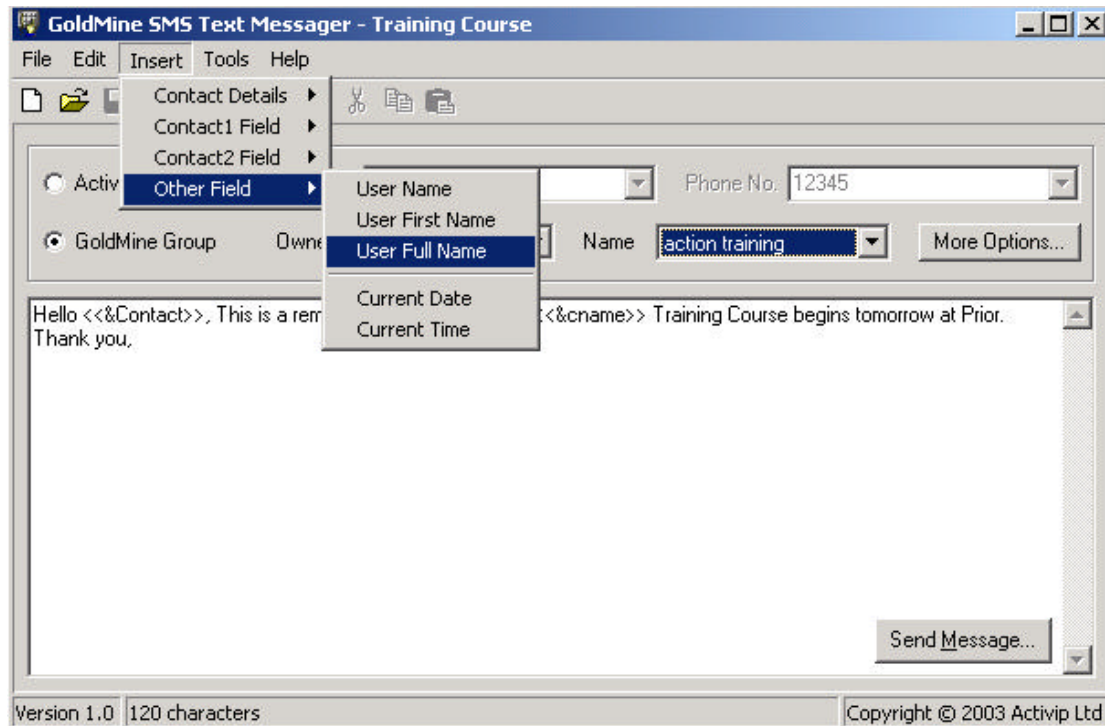
- 
1. In the **Select Contacts** area, select **Primary** and/or **Additional** contacts to be included in your group.
  2. **Include Merge Codes**– select either:
    - a. **Include if contact has any of the selected merge codes:** includes the contact if they have one or more of the merge codes you select.
    - b. **Include if contact has all of the selected merge codes:** only includes the contact if they have all of the merge codes you select.
    - c. Select the **Merge Code** from the drop down box.
    - d. Click **Add** to add the code to the list. If you make a mistake, select the merge code and click on the **Remove** button.
  3. **Exclude Merge Codes**– select either:
    - a. **Exclude if contact has any of the selected merge codes:** excludes the contact if they have one or more of the merge codes you select.
    - b. **Exclude if contact has all of the selected merge codes:** only excludes the contact if they have all of the merge codes you select.
    - c. Select the **Merge Code** from the drop down box.
    - d. Click **Add** to add the code to the list. If you make a mistake, select the merge code and click on the **Remove** button.
  4. When you have finished selecting your options, click on **OK**.



## Creating the Text Message

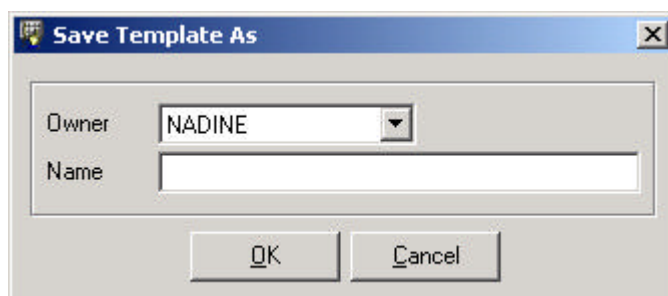
Click into the GoldMine SMS Text Message window and type the message.

To insert GoldMine fields into the message, place your cursor where you want the field to appear and select **Insert** and then the **GoldMine field** required from the menu.



## Saving a Template

1. To save the message as a template for future SMS message, click on the **Save** button on the toolbar.
2. The Save Template As window will appear.



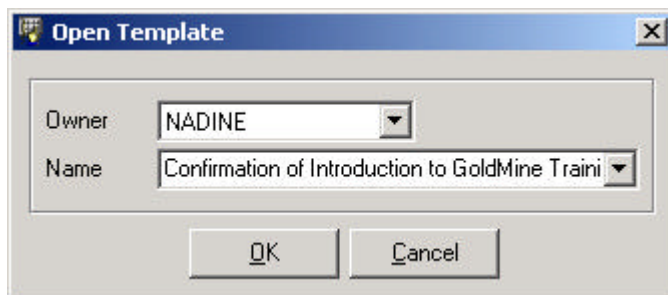
3. Select the **Owner** of the Template from the drop down box and then type in a **Name** for the template.



4. Click on **OK**. *Note: Saved Templates are stored as Email Templates in the Document Management Centre.*

## Using an existing Template

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. The Open Template window will appear.



3. Select the **Owner** of the Template and then select the **Name** of the template from the drop down box.
4. Click **OK** to load the template.

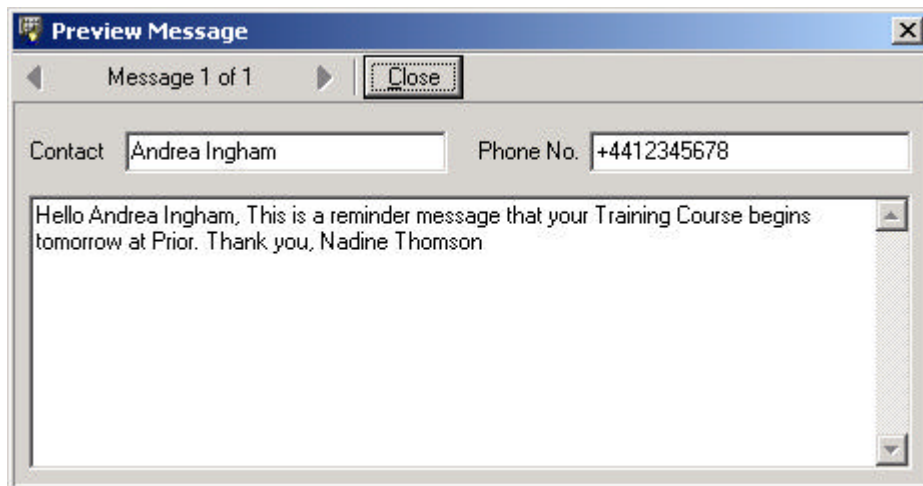


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## Sending the SMS

### Previewing the Message

1. To preview the SMS messages before sending, select **File** and then **Preview Message** from the menu.
2. The Preview Message window will appear.



3. To scroll through the other messages in the group use the **Forward** and **Backward** arrows in the top of the window.
4. When you have finished previewing the messages, click on the **Close** button.

### Sending the Message

Click on the **Send Message...** button in the main window.

A dialog box will pop up, confirming if the message has been sent successfully.



## SMS Program Settings

### Personal Options

1. Select **Tools** and then **Personal Options** from the menu.
2. To set the Number or Name you would like the message to appear to come from select the **Send from Number** or **Send from Name** option and type in the number or name.
3. Select **Prompt to save changes to messages** to enable prompts to save changes to templates or messages when you create a new message 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 are correct.

**Personal Options**

Set Personal Options

Send From Number

Send From Name

Prompt to save changes to messages

Use own SMS account

API ID:

Username:

Password:



## Message Options

Select **Tools** and then **Message Options** from the menu.

1. In the **Primary Contact/Additional Contact Mobile Field** select the GoldMine fields that contain the mobile numbers for primary and additional contacts.
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**.

Message Options

Set Message Options

Primary Contact Mobile Field: CONTACT1.PHONE3

Additional Contact Mobile Field: CONTSUPP.PHONE

Create history item for each message sent

Activity Code: SMS Result Code: SNT

Create group of contacts who couldn't receive message

Group Reference: SMS Failed

Check network coverage before sending message

Maximum Message Concatenation: 3 messages (455 chars)

Default International Code: 44

OK Cancel



## ActivSMS Set-up

### Activating ActivSMS

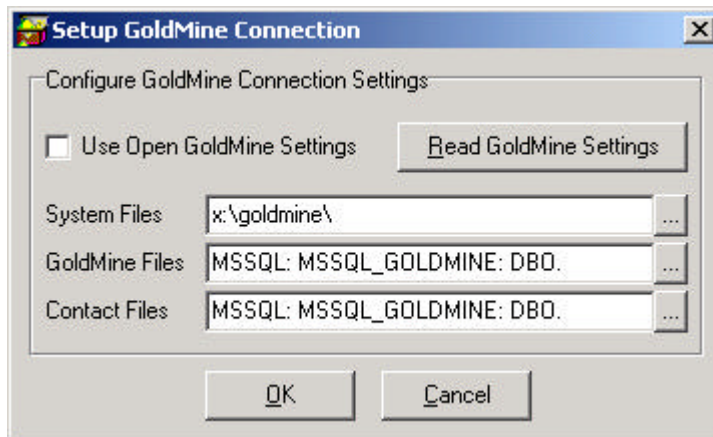
Upon successfully installing ActivSMS the first task is to activate the software. To obtain a licence key contact ActivIP Limited.

1. Run ActivSMS.
2. A dialogue box will appear requesting an activation key. Enter the licence key ensuring that it is typed correctly
3. Click **'Enter'**



### GoldMine Configuration

The GoldMine 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



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



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## SMS Connection Configuration

1. Fill in the details for the **API ID, Username and Password.**
2. Click on **Test Connection** to check the details are correct.

**SMS Connection** [X]

Configure SMS Connection Settings

API ID: 123456

Username: GoldMine\_User

Password: xxxxxxx

Server Timeout (secs): 60

[Test Connection] [Show Credit]

[OK] [Cancel]