# eCommunicate Desktop

(v2.6, 13 Dec 2016)

Introduction

eCommunicate Desktop enables you to send single or bulk smses from an easy to use Windows application, that communicates with the central eCommunicate System Servers.

The application is easy to use and based on the familiar email program structure of address book for maintaining contacts and groups of contacts, as well as the familiar inbox, outbox and sent messages sections for managing sent messages and receiving replies to emails.

eCommunicate Desktop includes useful features such as scheduling an sms to be sent at a future date, as well as personalised smses that allow you to give your sms messages a personal touch. Additionally the program includes some unique features not found in competitor products, such as the sent messages summary table and calendar view for scheduling smses.
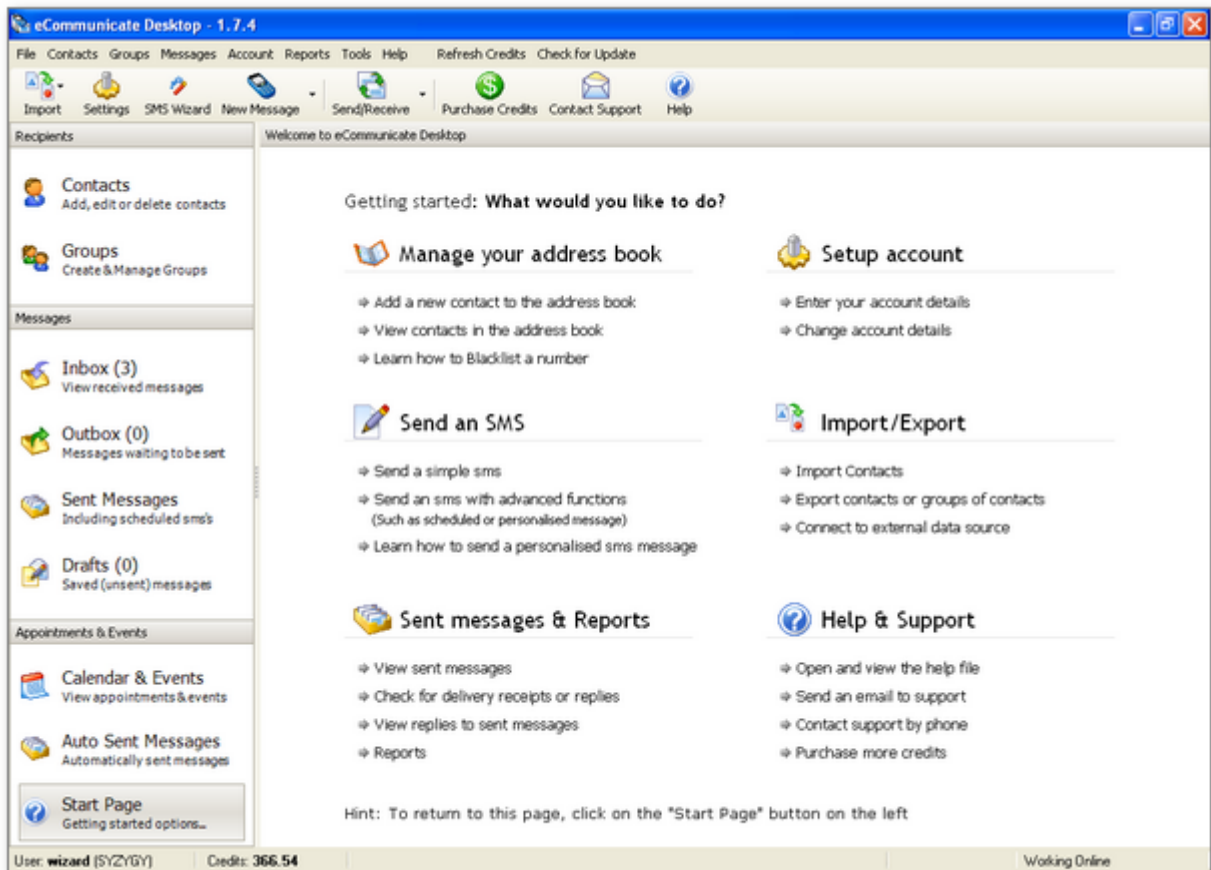
The following sections describe and highlight the applications features in more detail.

Installation

Welcome to the eCommunicate
Desktop Setup Wizard

This will install eCommunicate Desktop 1.7.6 on your computer.

- Standard Windows Desktop application that can be installed on Windows Operating Systems such as XP, Vista, Win7 etc.
- New versions can be downloaded and installed automatically if an internet connection is present.

Benefits:
- ✓ No need to worry about installing future updates after the initial installation – just click on a button and they will be downloaded and installed automatically.

Supporting Material

- The program includes a detailed **help file** that explains how to use the various parts of the application.
- Help buttons through-out the application can be pressed, and help for the specific dialog/section will be shown.
- Instructional **video tutorials** can be downloaded via the program (from the help menu). These explain how to use various parts of the application.

Benefits:
- ✓ The supporting documentation and video tutorials enable you to learn how to use the program with ease.

Feature highlights

- ✓ Full featured Address Book, allowing you to easily import contacts from various sources, maintain contacts in groups and export to Excel format.
- ✓ Unique summary view of sent messages allows you to easily see the overall progress of a sent message i.e. how many numbers have been received, how many waiting and how many failed. Then double click for detailed report of numbers.
- ✓ Extended import options allow you to import messages directly from an Excel file or compose a personalised sms directly from data in an Excel spreadsheet.
- ✓ View message history for a given contact, and also see a conversation history in the replies (inbox) section.
- ✓ Integrated calendar to easily schedule smses and view scheduled smses.
- ✓ Advanced sms reminders system – setup rules and have reminders/sms messages sent out automatically.
- ✓ Diagnose connection tool helps troubleshoot and diagnose connection problems

Address Book

The Address Book allows you to:
- maintain a list of contacts
- **import** contacts from a variety of sources such as **MS Outlook**, **MS Outlook Express**, **MS Excel**, and **CSV** (Comma Separated Values) format files.
- import contacts from an Excel spreadsheet including a **birthday field**
- Import a list of messages from Excel/CSV to be sent directly (without using Address Book)
- Import data from Excel/CSV to create a personalised message without the need to import into the Address Book.
- **blacklist** specific numbers
- **organise** contacts **into groups** - each contact can be in more than one group.
- **Copy groups** – Maintain similar groups with only a few changes from each other.
- **Split** groups into smaller sub-groups if needed
- store additional information for each contact such as address information and notes.
- setup **additional fields** for each contact to store **custom information** required specifically by your company, e.g. Policy Number, Home Phone Number.
- easily and **quickly find** a contact by searching on first name, last name or cell number
- optionally **filter** contacts **display** alphabetically (e.g. only show contacts whose last name starts with "A")

Benefits:
- ✓ The Address Book integrates seamlessly with other lists of contacts such as MS Outlook and Excel files, and allows you to import from these sources easily.
- ✓ Easily setup different groups of contacts with the many group management features such as copy and split group, and copy, move and remove contacts from a group.
- ✓ A number of different import options exist which allow you to easily send smses based on your current need: in other words, you don't have to fit your data into just one import option. The application caters for a number of different scenarios frequently encountered by users.
- ✓ The Address Book is flexible and allows you to store your own custom data not just standard fields like "firstname", "lastname".
- ✓ The filtered display and "find" button allow you to quickly and easily find contacts that you are looking for.
- ✓ Importing birthday fields (from Excel documents), makes setting up birthday reminders a real breeze.

Dropbox sync

The program allows you to sync your contacts between different computers via the Dropbox integration (a free online file storage service).

Benefits:
- ✓ Contact lists can be shared amongst different users in the organisation.
- ✓ Work with same contacts at office and home.

(It is also possible to sync the entire database via Dropbox to different computers; however, this requires that only one user is using the program at a time, and that each user syncs their changes before the next user starts working on the program.)

Contacts Screen, filtered by the letter B.
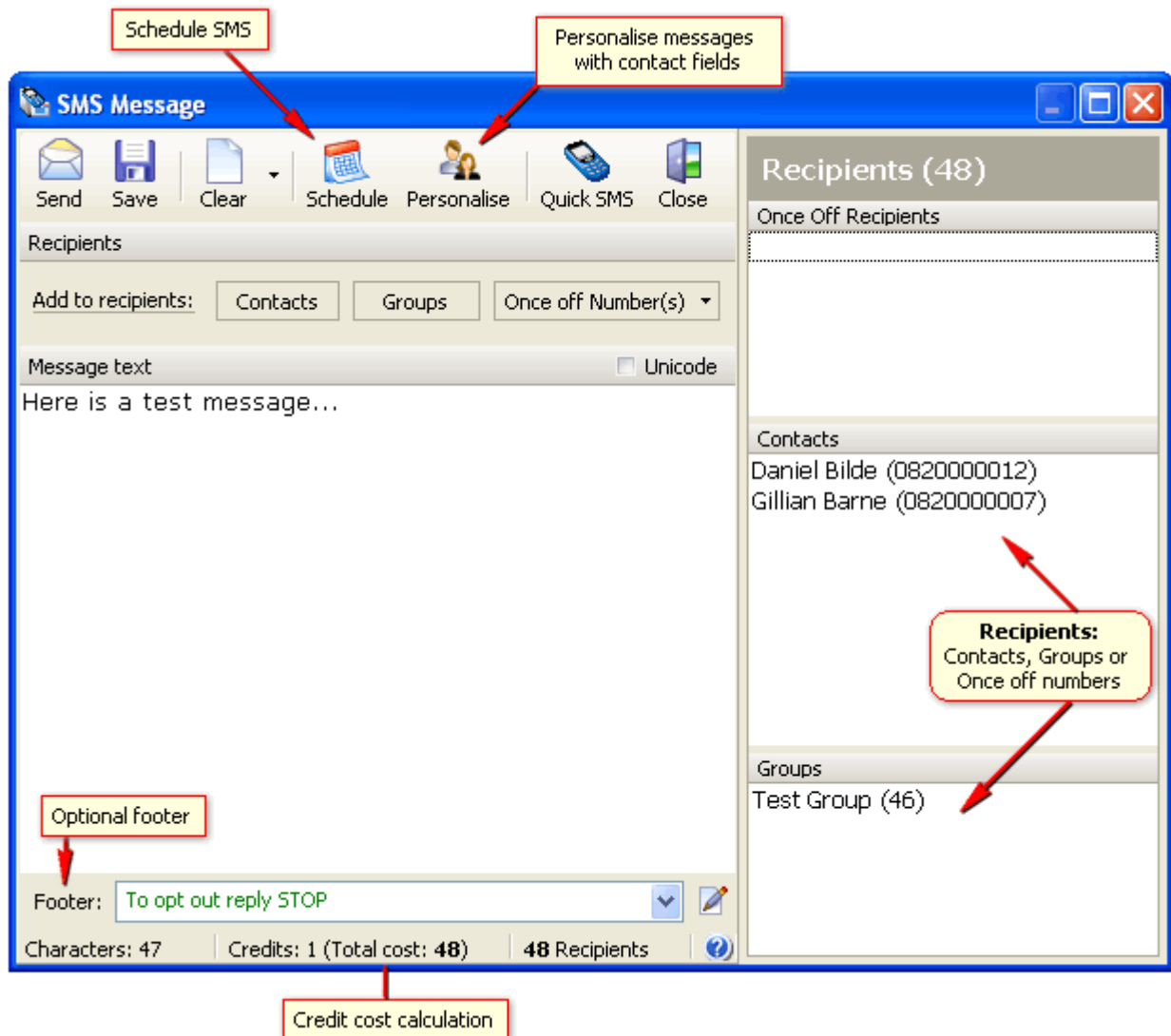

Group Manager dialog: Allows you to add/remove contacts to a given group

Sending an SMS

Sending smses can be achieved using the **simple sms** dialog (for a quick an easy way of sending an sms) or the **advanced sms** dialog (for more advanced features).

The Advanced SMS Dialog

When sending an sms you can:
- select **individual recipients** or **groups** from your Address Book
- **type in a list** of numbers (not in your Address Book)
- **paste** in numbers **from** the **clipboard** (extraneous characters will be automatically removed)
- **load** numbers **from** an **MS Excel** or CSV file

Furthermore you can
- base your message on a pre-saved **template**
- add a pre-saved **footer** message to the end of your message.
- **schedule** the message to be sent at a future date
- **personalise** your message with title/firstname/lastname contact fields.
- see a **preview** of your personalised message (i.e. how it will look for each recipient), and identify problem personalised messages (e.g. a contact is missing a firstname), and choose to ignore or fix such problems.
- Enable email notifications for delivery receipts and replies if required.

While typing the message the user sees an up-to-date display of number of **characters used**, **remaining characters** until a new credit is required, and total **credit cost**.

Benefits:
- ✓ Very quick and easy to select desired recipients and send an sms.
- ✓ When sending a personalised sms, you can see a preview of what the message will look like for each recipient. This helps catch problem messages before sending out.
- ✓ The ability to personalise smses to recipient names allows you to add a personal touch to your communications and is likely to result in a more active response from recipients.
- ✓ Pasting numbers from the clipboard into a new message, is an easy way to insert a list of recipients from e.g. an email that contains the numbers.
- ✓ Setting up pre-made templates and footers saves you a lot of time in composing messages that contain frequently used texts.
- ✓ Having the facility to schedule and then cancel scheduled messages (before the scheduled time) allows new users to test run the program before sending out a "real" message.
- ✓ Having the facility to schedule a message means you do not need to have the program running or even your computer on at the time that you want the messages sent. Once a message has been sent to our servers, you do not need to have your computer on for it to be sent.
- ✓ The character count and credit cost counters inform you how much the message will cost and ensure that you do not unnecessarily send out a message that will cost more than one credit per recipient.

Message Templates

The message templates feature allows you to setup pre-made messages that can easily be inserted into a new (blank) message.

You can access the template commands from the **SMS dialog**: from the "**Templates**" tool button (on the icon toolbar), or by **right clicking** in the "Message Text" area.
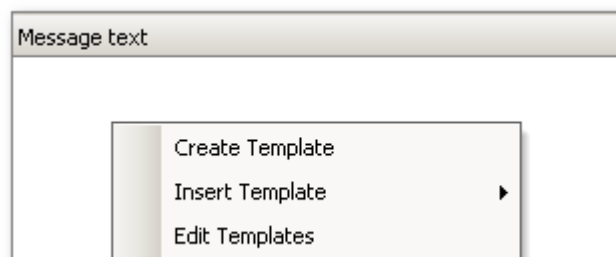
Create Template: creates a new template from the current text in the message editor.
Insert Template: shows a popup menu of existing templates (click on desired template to insert).
Edit Templates: Brings up the Message Templates dialog where you can add, edit or delete templates.

Personalised SMS Messages

The personalised SMS feature allows you to insert a contact field (Title/First Name/Last Name) into an SMS message, so that each recipient receives a different message based on their unique contact information. This gives your message a personal touch and helps improve customer relations.

Here we have a sample personalised sms message:

We select to send this to one of the groups in our Address Book. The personalised message preview gives us a feeling of what the message will look like for each recipient in the group, and also highlights any possible problems:

The Personalised Message Preview Pane

In this example, we can see that there is a problem because one of the contacts in the recipients group is missing the First Name field. We can click on this entry to add this missing information for the contact (and thereby resolve the problem), or decide to skip sending the message to this specific contact.

It is also possible to send a personalised SMS from an Excel spreadsheet, i.e. you do not need to import the contacts into the address book first, but can create a personalised SMS directly from the columns in the Excel spreadsheet. To do so, you click on the "Import" button (on the main toolbar), and then select the "Create a personalised SMS from Excel data" option.

Sent Messages

The Sent Messages display grid gives you an instant summary view of the status of a previously sent message - indicating how many messages have been successfully delivered, are still waiting for delivery information (i.e. not sure if message has been received by the recipient) or have failed (for example blocked number, invalid number or unreachable number).

The detail view shows exactly which numbers fall in each of the above mentioned categories and gives detailed status information on a per number basis.

Additional features provided by the Sent Messages section:
- **cancel** a future dated batch that has not been sent yet (credits will be re-added to your account)
- **resend** a previously sent message
- **stop** a message that is currently being sent, and resume it at a later time.
- see a **report of** any **replies** that have been received to a given sent message
- **Print** out a report of a single message or range of messages
- **Export** a report of a single message or range of messages to HTML, PDF or RTF format.
- **Filter** the message display to a given time period e.g. messages sent in last week, month, 3 months etc.. or given range.
- View details for a given message such as failed numbers, skipped numbers, numbers with replies, numbers without replies, and print out each list or export to MS Excel.

Benefits:
- ✓ Easily see the status of a sent message (batch): still scheduled?, how many delivery receipts are still pending?, and how many numbers failed.
- ✓ Obtain detailed information for every message sent and export or print this data to common formats.
- ✓ The view filter allows you to deal with "bite sized" pieces of information, instead of being over-whelmed with a large list of all messages you have ever sent!
- ✓ Export a list of failed numbers so that appropriate action can be taken: e.g. remove these numbers from the database so that credits are not used up again on these problem numbers.

Replies

Replies to messages are stored in the **inbox** and also show a list of recent messages sent to/received from this number:

Message History (Last 7 days) [More History]		
Date	Type	Message
2012/08/27 01:14:22 AM	Reply	**This is a reply to "Hi, did you get this message?"**
2012/08/27 01:14:18 AM	Message Sent	Hi, did you get this message?

Inbox section showing a reply message and the original message in the conversation history.

- A range of replies can be printed or exported to MS Excel
- The display can be filtered on a selected time period, e.g. last week, month, 3 months etc..
- Each reply is marked read/unread for easier processing.
- "Send Reply" action, allow you to easily send a reply to the received message.
- The **conversation history** allows you to keep track of your communications with a specific client.
- A report can be generated that only contains specific replies e.g. all replies that include the word "yes" or "no".
- Detailed standard and shortcode replies report available, showing number of messages sent per day, per week and per month.

Benefits:
- ✓ The program helps you follow a conversation by showing the (most probable) message that the person is replying to.
- ✓ Keep track of which replies you have read or not with a "read/unread" marker.
- ✓ Flexible reporting options allow you to export specific replies that require a specific action e.g.: remove these numbers from database (they replied "no") or follow up with this list of clients (they replied "yes"), etc..
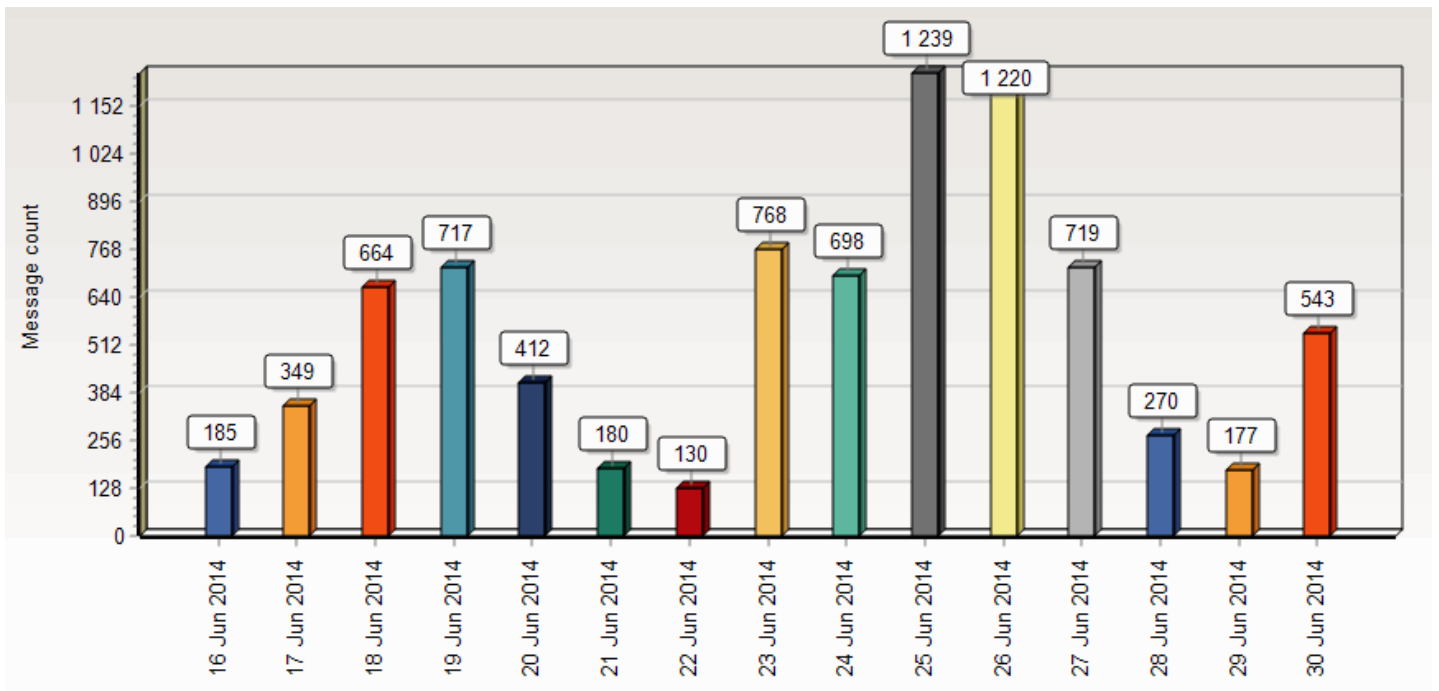
Reports

The application includes various reports such as:

- **usage** report - general overview of number of smses sent on a monthly basis.
- **detailed** report of smses sent - based on time period, status code, and cell number criteria
- list of **duplicate** numbers in the Address Book database
- list of **blacklisted** numbers, and ability to add or remove numbers from this list.
- **failed** numbers report - specific report of failed numbers based on a given time period.
- **Group analysis** tool - allows to monitor which contacts are in more than one group.
- **Sent SMSes Percentage Analysis Report** – get an overview (for a given period) of how many smses were sent successfully (confirmed and unconfirmed) and how many failed. Also obtain a list of replies containing a specific term.
- **Standard Replies and Shortcode Replies Report** - comprehensive replies report showing details such as time of day messages were received, number of messages per day, per week and per month. The shortcode report allows you to select specific shortcodes and keywords to include in the report.

Benefits:
- ✓ Reports allow you to get an overview of your usage of the program for budgeting purposes.
- ✓ Save money by removing failed numbers from your database.
- ✓ Maintain a list of current contacts in your Address Book: remove duplicate numbers.
- ✓ Ensure a user is not mistakenly in two groups, which may result in them receiving a message more than once (if each group is sent to individually).
- ✓ Make informed business decisions based on detailed standard and shortcode replies reports.

Example month view for replies report

SMS Reminders

The application also includes a unique feature which allows you automatically send out sms reminder messages based on pre-defined rules:
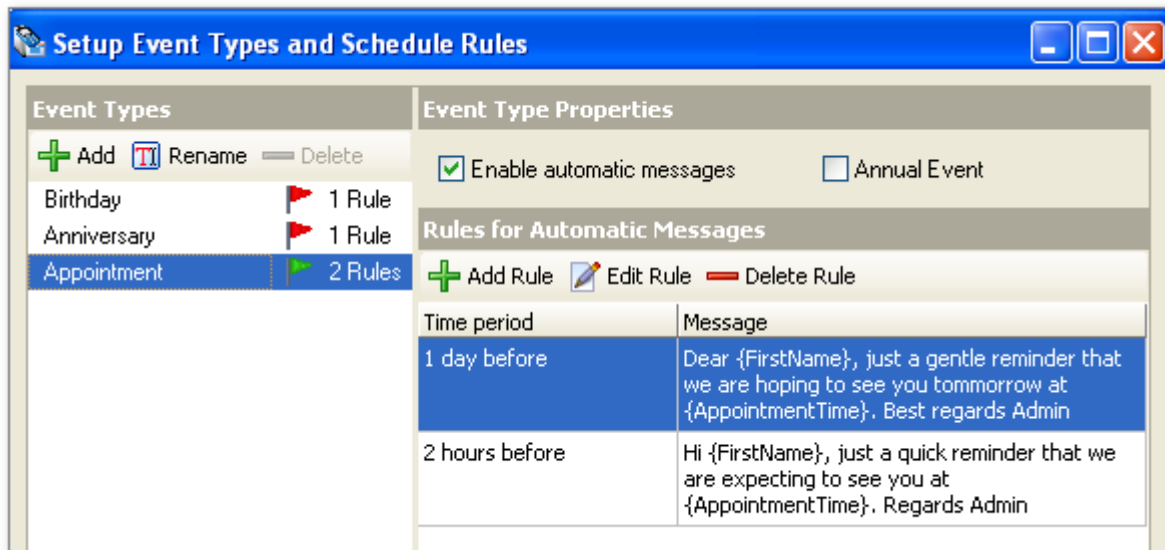
The Setup Schedule Rules dialog helps you setup the automatic rules.

You first setup your reminder rules (e.g. send a message 1 day before an appointment, and setup what the message will say), and then all you need to do is enter the appointment or birthday into a calendar, and sms reminder messages will automatically be generated for this event.
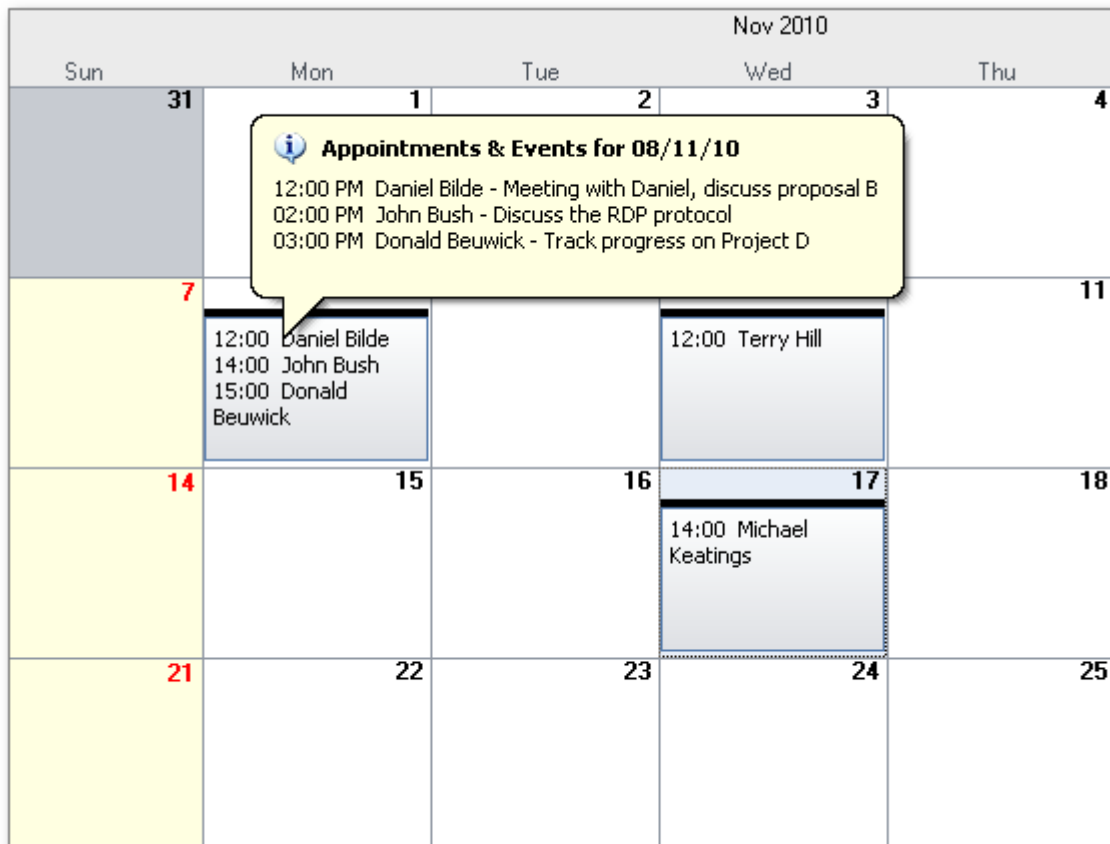
Calendar view showing a number of appointments.
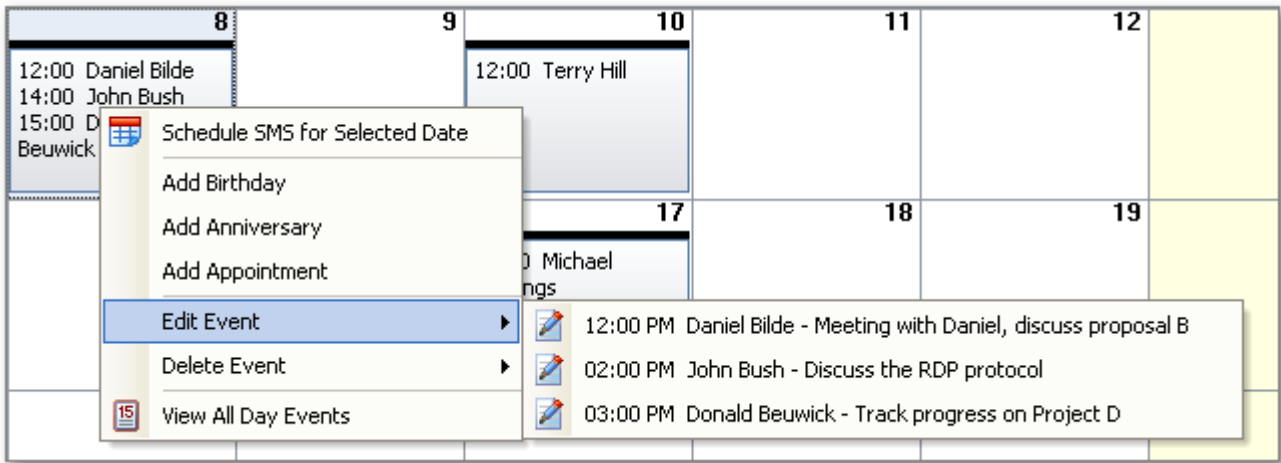
The right click menu allows you to quickly edit or delete an existing appointment.

Should you need to cancel the appointment, the auto-generated messages will be cancelled, and credits will be restored to your account. The list view shows the automatic messages that will be generated for each appointment.

It is also possible to click on the calendar to easily setup a future dated sms message (as seen in the picture above "Schedule SMS for Selected Date").

Benefits:
- ✓ In the calendar view, easily see scheduled appointments.
- ✓ The day view allows you to easily change appointment details (e.g. time of appointment).
- ✓ Make use of a powerful reminder system, that will help you save costs by replacing (appointment confirmation) phone calls with cheaper smses.
- ✓ Use a system that sends out reminder smses automatically and does not require *you* to remember when to remind the other person!

Birthday messages

The program has a function which enables you to send birthday messages to all contacts or to a specific group, or to all contacts in an external database. (In the program you need to specify the location of the external database, and also specify which columns contain the cell numbers and birthday information.)

You can send out the birthday message to all contacts that have a birthday in the coming week/2 weeks or month.

Benefits:
- ✓ Boost your Public Relations by sending birthday messages to contacts on their birthday.

SMS Shortcode Campaign Manager

In a typical SMS shortcode campaign, you receive a large number of sms replies which all come pouring into your Inbox. Usually you want to group the replies together based on the message text – e.g. all people that replied "Yes" go into "Group 1", and all people that replied "No" go into "Group 2". In this way you can then send a different "next step" message to each group. This is exactly what the ShortCode Campaign Manager helps you do:

➢ Group together received shortcode replies based on the message text
➢ Send out pre-defined messages to each group.

The campaign manager can operate in a simple or advanced mode. In simple mode, messages are filtered by single keywords. In advanced mode, single keyword filters can be combined into categories to enable more complex filtering of incoming messages.

So let's take a real life example. You are running a shortcode campaign, where people are asked to reply in the suburb they live in. Based on this information you will then send a message appropriate for their location. So for this campaign you will want to set up a number of categories, and define filters for each category. For example: you want all messages that contain the word "Germiston" to go into the Germiston category, and all messages that contain "JHB" to go into the "JHB" (Johannesburg) category. You can set up the filter to contain numerous terms, and also include misspellings, so for example any sms that contains "JHB" or "Joburg" or "Johanes" or "Johannes" will go into the "JHB" category.

In the Categories view, you can setup a different message for each category. You then send out a message to a specified number of replies. (Often the business wants to send out their smses staggered over time, so they send out a number of messages each day). The display shows how many messages have been received for each category (for a selected time period), how many have been replied to, and how many have not been replied to.

Category	45490	43059	45280
☐ Totals	5993,1356 (4637)	570,98 (472)	1010,36 (974)
☐ General	1041,34 (1007)	151,3 (148)	149,0 (149)
☑ Cape town	48,0 (48)	0,0 (0)	1,0 (1)
☑ Carltonville	16,13 (3)	0,0 (0)	3,1 (2)
☑ Evaton West	28,3 (25)	5,1 (4)	9,0 (9)
☑ Germiston Gen	331,50 (281)	26,5 (21)	67,1 (66)
☑ JHB General	1964,647 (1317)	158,34 (124)	314,15 (299)

Table showing list of groups and number of messages in each group per shortcode number.

Features:
• Easily set up groups for the messages to go into.
• Setup multiple text filters to control which group the message goes into.
• Setup predefined messages to send to each group.
• Control how many messages are replied to each time (manage replies in small batches).

Benefits:
✓ Manage large numbers of replies by grouping them together.
✓ Large amount of control on how to group messages.
✓ Be freed of dealing with individual messages and instead deal with large numbers of messages in a batch like fashion.
✓ Time saving features: Setup a pre-defined message for each group.
✓ Different display modes to highlight total number of messages received or just how many messages still need to be replied to.

Testimonials

"The training went very well and your product is very user friendly.
I am very excited to get started and see the results we get from this!

Many thanks
Kind Regards,"

Leanne van Wyk
Brand Manager
Kairuz Holdings (Pty) Limited

(With permission)

From Jennie Cooney Monday, December 12, 2016 3:03 PM

I had to evaluate 3 different Bulk sms services for a client of ours and then refer him to the recommended one.
Without a doubt your sms Desktop service was the best one. It was user friendly and the customer service that I phone were very friendly, helpful and enthusiastic.
I recommend your service hands down.

Keep up the good work. You guys ROCK!!

Groete / Regards
Jennie Cooney
admin@bligit.co.za
T: 087 700 1130

F: 086 535 6292

Awesome awesome desktop SMS system - superb!

Ephraim Zaslansky
Rentals & I.T. Manager

(With permission)

(With permission)

Appendix A: How to import contacts from an Excel spreadsheet including a birthday field

(Note: a video tutorial is also available on our website, http://www.ecommunicate.co.za/downloads.htm)

❖ **The first part is to enable the Birthday Reminders feature:**

1. Go to the Calendar section. Click on the "Reminders Wizard" button.
2. Click on "Next
3. Click on the large "..Setup Reminder Rules for Birthdays" buttons.
4. Select desired time for message to go out.
5. Edit the default message to fit your company requirements. (Note: You should include a {firstname} personalisation field in the message, if first name information will be available)
6. Click "OK" to close this dialog
7. Now click on "Enable Reminders", to enable Birthday Reminders

❖ **The second part it to import the contacts from the Spreadsheet:**

1. Follow the usual steps to import contacts from an Excel spreadsheet:
   a. Click on Import (Top Left Button) -> Import into Address Book from -> Excel
   b. Select Excel file
   c. Select spreadsheet page from drop down list
   d. Tell the program which column in the spreadsheet corresponds to which contact field, by clicking on the drop down list at the top of each column (it says "don't import" by default)
2. For the birthday field, select "Birthday" from the drop down list
3. (The birthday information should be in standard birthday format e.g. dd/mm/yyyy)
4. Continue with the import as per usual
5. When the actual import occurs allow time for birthday reminder messages to be generated and sent to the server.