

Quickly & easily send text messages to one or more contacts from the Act! contact detail view, recording sent & received messages to Act! history.

Note: This guide is appropriate when using Act! installed on a desktop. A separate guide is available for web browser access to Act! (eg. Act! Premium Cloud or self-hosted Act! Premium for Web).

### The SMS menu and "Send SMS" Global Toolbar button

If SMS4Act! is installed, you will see a new menu labelled "SMS" and a global toolbar button labelled "Send SMS" as shown below. If these are missing, close Act! and download & run the SMS4Act! installer from <a href="https://sms4act.com/downloads">https://sms4act.com/downloads</a>, complete the wizard & open Act!



#### **Get Started**

Click the SMS menu and select Get Started, then follow the steps in the Get Started window to start a free trial. If insufficient permissions or using a remote database, a message will prompt to ask your Act! administrator to follow these steps on your main database, via Act! Premium or Act! Cloud.

Get Started Account Settings Optional Features Templates Help & Support
Get Started SMS4Act! is a free add-on that allows quick easy sending of SMS messages to one or more contacts from your Act! database. Messages are recorded to the contact's history tab, along with any replies. All you need is an account with MessageMedia. With multiple plans available to fit your budget, you will be able to easily and affordably create SMS campaigns or send reminders. To get started, complete the steps below:
Step One Create an SMS activity type in your database To enable sending SMS messages and record to Act! history, click the button below to create an SMS activity type in your Act! database. Create Activity Type
Step Two Replies to your SMS messages will be forwarded to the Email address you provide below. Email Location Canada Step Thr France Gemany Start SMS Netherlands New Zealand Get instant Replublic of Ireland One credit United Kingdom such as em United Kingdom such as em United Kingdom Start Free trial

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### Send SMS

After starting a trial, lookup one or more Act! contacts to receive your message. Then click Send SMS either on the SMS menu or the Global Toolbar:

SMS4Act!	Send SMS	×			
i 🕅 🖪		Trial valid until 12 Jun 2023 with 25 credits remaining.			
Send To:	Current Contact - Admin []				
	C Current Lookup - 63 Contacts	Exceeds available trial credits of 25			
14 characters   1 credit					
This is a test					
To use emoji press ⊞ + period (.)					
Phor	ne Field Mobile Phone	•			
SMS	<b>54Act!</b>	Send Cancel			

- Select whether to send to the current contact or the current lookup. Please note that sending a single message to 25 contacts will use all 25 credits available for the trial.
- Type the text of the message you wish to send.
- Select the phone number field to which the message should be sent.
- Click Send SMS.

Emoji



If you wish to include emoji in a message, hold the Windows key, and press the period (.) key. If you use a Mac, simultaneously press Control + Command + Space. Please note that using non-standard (unicode) characters, such as emoji, reduces the number of characters per credit from 160 to 70, and as a result your message may cost additional credits, as indicated in the Send SMS window.



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### Send Limit

When sending to the Current Lookup, you may see the message below, if the number of contacts in the current lookup exceeds the limit that you set in SMS Preferences. If you wish to send anyway, check the box shown below to continue.



#### **Optional Features**

If you are signed into the main database as an Act! Administrator or Manager, with all other users signed out of the database, then you can click one of more of the buttons shown below to create new contact fields in Act! to track additional information from your use of SMS4Act!. Alternatively, ask your Act! administrator to manually create these fields exactly as instructed below.

Account Settings	Optional Features	Templates Help & Support
If you are signed one of more of th ask your Act! ad	l into the main data te buttons shown b ministrator to manu	base as an Act! Administrator or Manager, with all other users signed out of the database, then you can click elow to create new contact fields in Act! to track additional information from your use of SMS4Act!. Alternatively, Jally create these fields exactly as instructed below.
Enable SM	IS Opt Out	Create a new Contact Yes/No Type Field "SMS Opt Out"
Enable Las	at SMS Sent	Create a new Contact field 'Last SMS Sent' (datetime field type)
Enable Last S	SMS Received	Create a new Contact field 'Last SMS Received' (datetime type field)
In order to see th menu > Customia	nese fields in the A se Columns to add	ct! application, use Tools menu > Design Layouts > Contact to add them to the contact layout; or use Tools these fields to the Contact List view.

In order to see these fields in the Act! application, use Tools menu > Design Layouts > Contact to add them to the contact layout; or use Tools menu > Customise Columns to add these fields to the Contact List view.

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### After the trial

To send messages after the trial, you will need a MessageMedia account, which will have a monthly fee. Click the SMS menu & select Account Settings. Then click "Select a messaging plan" to be directed to the sign-up page for customers in the United States, Canada, United Kingdom, Australia & New Zealand. Customers in other countries can use SMS, but need to contact MessageMedia Sales via phone, email, or web to request an account (see <u>www.messagemedia.com/uk/contact</u>).



After you complete the above form, you will be prompted to select from the plans available in your region. Plans are paid monthly, with no minimum term, so you can change to a different plan or cancel at any time.

The monthly fee includes messages to the value of that fee. Plans with a higher monthly fee provide a lower cost per message, and therefore include more messages per dollar. If you send more messages than included in your plan, the additional messages are billed at the end of each month at the same cost per message (determined by the selected plan).

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### Creating an API key & secret

After creating a MessageMedia account, login to <u>https://hub.messagemedia.com</u> with your email address and MessageMedia password; click "Settings"; then "API Settings". Under HMAC Authentication, click "Create new key":

HMAC Authentication	
API Credentials can be provided in a request using HTTP HMAC authentication.	
API KEYS	Create new key

Type a label, such as "Act!", and click "Create key". Copy the api\_key, return to the SMS Account Settings page in Act!, and paste in the key; then copy the api\_secret and paste that into the SMS Account Settings page as well. Send a test SMS & if not received, please contact MessageMedia for assistance via the link on the Help & Support page of the SMS menu (see next page of this guide).

			New API Credentials Created X		
			Please record these details in a safe place. Once this popup is closed you will no longer be able to retrieve your API		
	Create hmac API Key	Х	secret.		
	Give the API key a label so you can identify it later.		[Act!] api_key = iFeZZRPjHTnle1juwRmx api_secret =		
	copy to clipboard				
	Cancel Create	key	Ok		
<mark>Mess</mark> Trial v	ageMedia Account alid until 12 Jun 2023 with 25 credits remaining.				
By star	ting this trial, you accept MessageMedia's <u>Terms of Service</u>	and a	Privacy Policy		
To cont and ent	To continue sending messages after your free trial, <u>select a messaging plan here</u> , then <u>create a HMAC API Key as explained here</u> and enter those details below to allow SMS4Act! to send and receive messages via your MessageMedia account.				
You car	n manage your MessageMedia account here				
API Key	API Secret				
Maximu	um recipients per send 500 ÷				

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#### Replies

You can click "Check for Replies" on the SMS menu to check for replies once. However, you may prefer to enable "Automatically check for replies" every 5 minutes as shown below in the Account Settings window. This will only occur while Act! is open & signed into the database. Replies will then be recorded to Act! history. Enable the option to "Email replies to sender" to have replies forwarded to the email address of the user who sent the original message, and optionally include the original message in that email.

SMS Replies - not available with a trial account				
Automatically check for replies every 5 📩 minutes				
This should only be enabled on one computer per Message Media account				
✓ Email replies to sender				
Trial will forward SMS replies to the user via email but does not record SMS replies to Act! history				
raid plans can forward bits replies to the user via email rLUS record SMS replies to Act: history				

#### Templates

Click "Edit/Create SMS Templates" either on the SMS menu or the Global Toolbar, or in the Templates tab of the preferences window.

Account Settings	Optional Features	Templates	Help & Support	
Default SMS Ter	nplate			
				🛁 🔁
Default Activity	Femplate			
				<b>2</b>
Use Activity	Type Templates			
Automatically looks for a template with a filename matching the Type of the selected Activity.				
Edit/Create	Templates			

Click the open/folder icon to load an existing template into the editor, or click the save/disk icon to save changes, or the arrow to the right of the save/disk icon to save as a new template. While Field Type is set to "Contact" you can merge the recipient's details into the message. Change it to "My Record" to merge the user's details (eg. to the end of the message). Select the field you wish to insert into the message & click Insert Field. You may also type into the editor. Eg. Type "Hello", and then insert the First Name field as shown.

SMS4Act!   Edit Templates	_	$\times$
🖺 🔯 🔚 -		
Field Type		
Contact		-
Fields		
First Name		•
Insert Field		
Hello [C:First Name]		

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You can also select Field Type = Activity to insert activity fields, such as Start Time, into a message.

In the Send SMS window, you can load an existing template by clicking the open/folder icon in the top left corner, or save a message as a template by clicking the save/disk icon.

SMS4Act! | Send SMS

Templates have the file extension ".sms" and are stored in the Templates folder of your database files folder with Act! email and letter templates. Instead of starting each message from scratch, you may wish to enter the name of a template in the Default SMS Template field in the Templates tab of the Preferences window to start each message with that template.

SMS4Act! includes default SMS templates for Call, Meeting, To-Do and Appointment type activities. If you have custom Activity Types in your database, you can create a new SMS template using the exact name as the Custom Activity and it will auto select this message template when sending an SMS from an activity of that name. eg. Custom Activity "Support" and SMS Template: Support.sms

SMS technology allows a maximum message size of 160 characters (or 70 characters if you include any Unicode characters). If a user sends a longer message, the system splits it to two or more separate messages to be reassembled on delivery so that they appear to be a single message (or, on some handsets, may be delivered as a series of separate messages). When a longer message is split in this way, the components are no more than 153 characters long (or 67 characters long if you include any Unicode characters), because a number of characters are used to re-join on delivery. As a result, a longer message will result in more than one SMS being transmitted, and charges apply accordingly.

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### Help & Support

On the SMS menu, or any SMS4Act! window, click Help & Support to see links appropriate to your region/language to this guide; MessageMedia support; and Act! support:



### Troubleshooting

#### 1. Send message failure

If you receive an error attempting to send a message, check the phone number for each recipient, including the country code (click the ... button next to the phone number). If the message appears to send, but is never received, please contact MessageMedia for assistance.

### 2. Functions disappear after an Act! upgrade

Install the latest version from <u>https://sms4act.com/downloads</u> and follow this guide to reset:

https://help.act.com/s/article/Using-3rd-Party-Plugins-with-Act-v24-prem?language=en\_US

#### 3. Anti-virus/Firewall

Check that your antivirus or firewall software is not blocking functionality.