

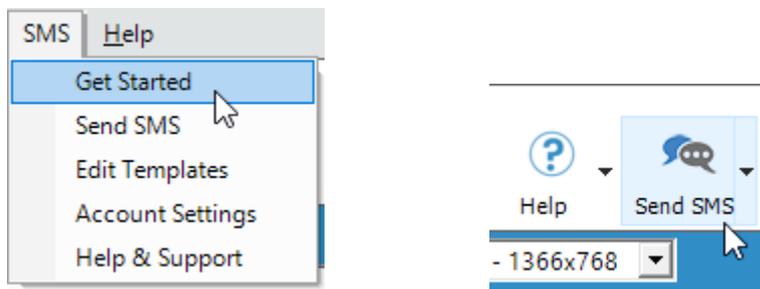


Quickly & easily send text messages to one or more contacts from the Act! contact detail view, recording sent & received messages to Act! history.

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).

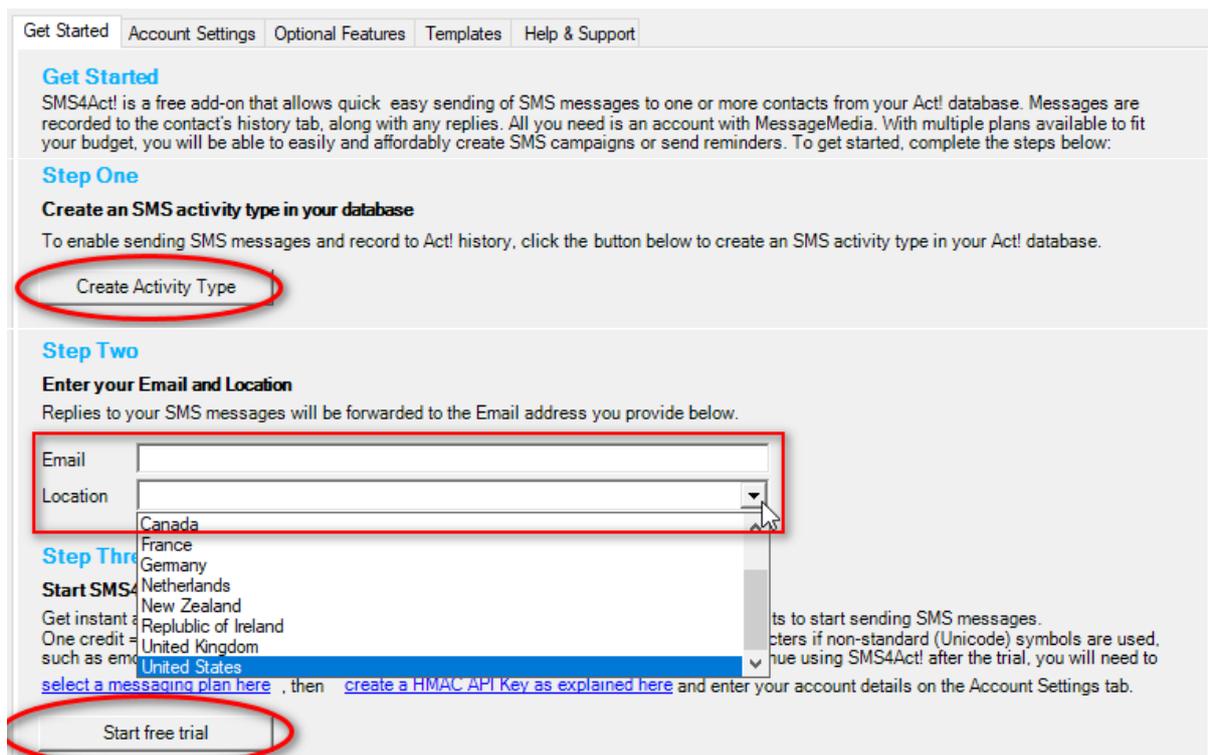
The SMS menu and “Send SMS” Global Toolbar button

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 <https://sms4act.com/downloads>, 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.

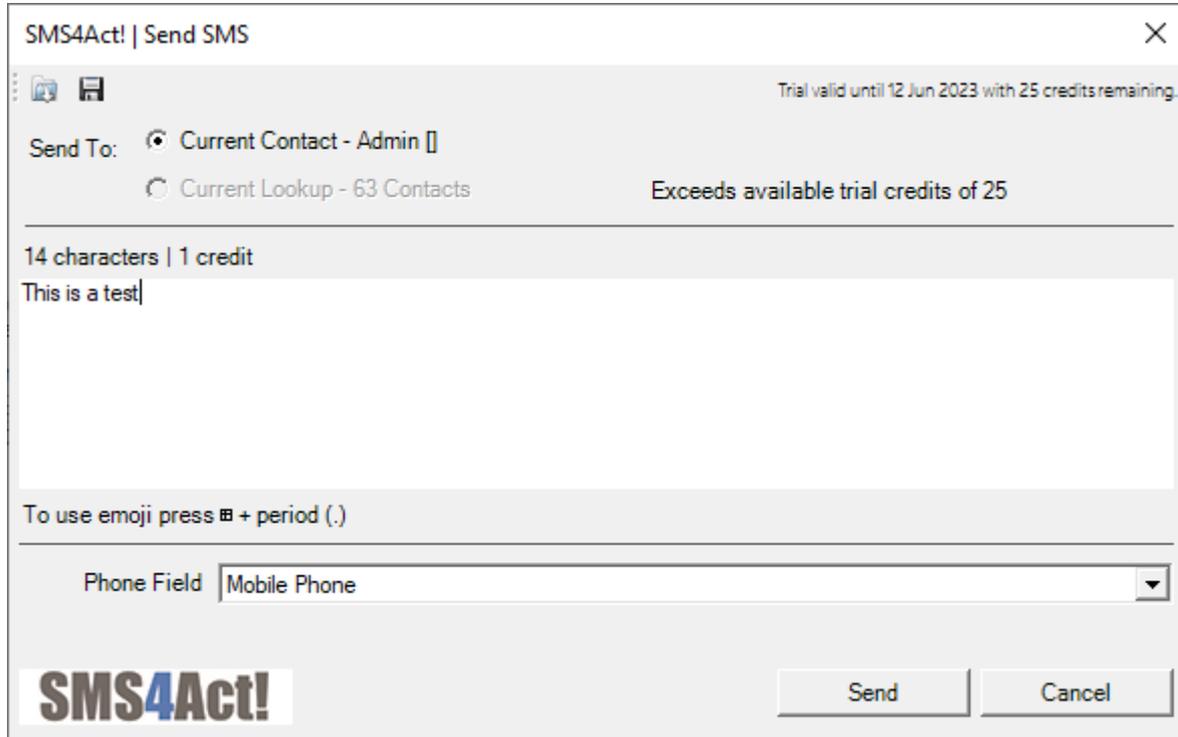


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Send SMS

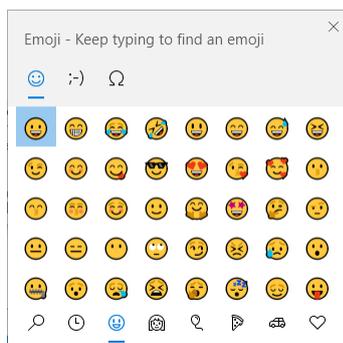
After starting a trial, lookup one or more Act! contacts to receive your message. Then click Send SMS either on the SMS menu or the Global Toolbar:



- 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.



Send SMS

Send To:

Current Contact: Chris Huffman [CH TechONE]

Current Lookup: 22,243 contacts

Exceeds send limit of 500 Override send limit

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 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.

Enable SMS Opt Out	Create a new Contact Yes/No Type Field "SMS Opt Out"
Enable Last SMS Sent	Create a new Contact field 'Last SMS Sent' (datetime field type)
Enable Last SMS Received	Create a new Contact field 'Last SMS Received' (datetime type field)

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.

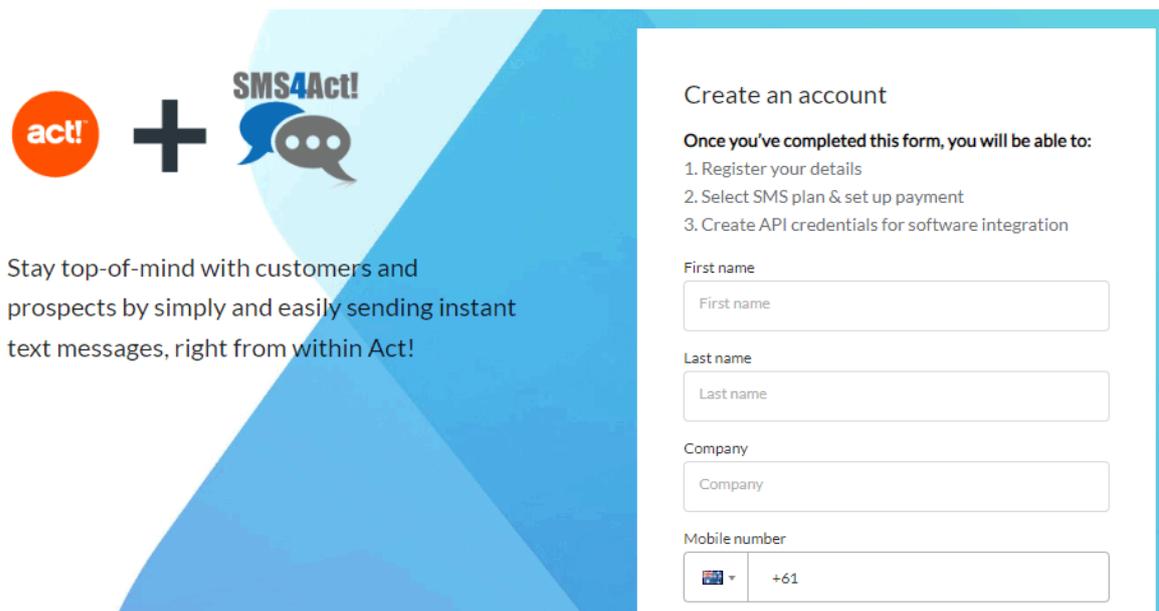
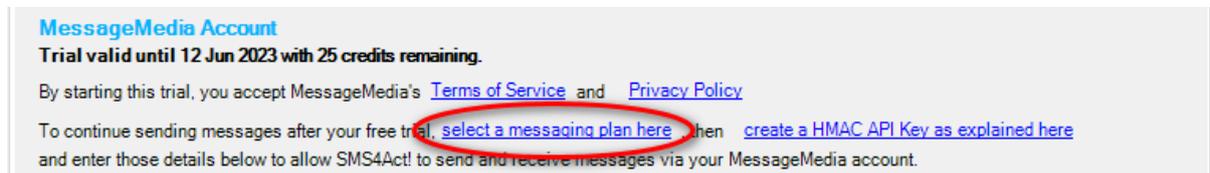
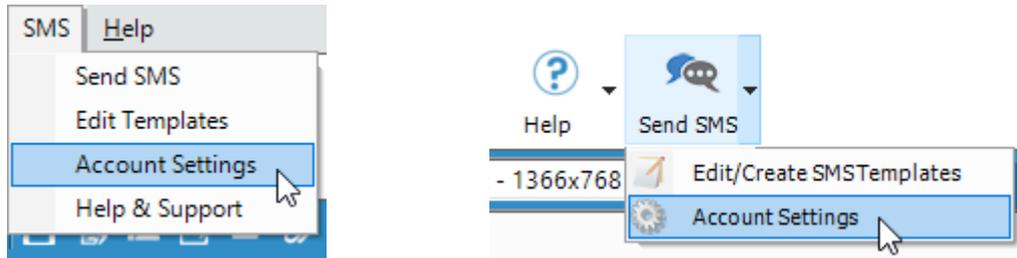
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After the trial

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 www.messagemedia.com/uk/contact).



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.

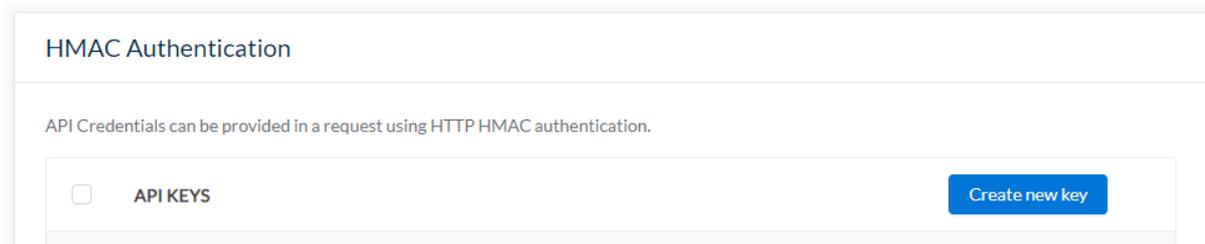
The monthly fee includes messages to the value of that fee. Plans with a higher monthly fee provide a lower cost per message, and therefore include more messages per dollar. If you send more messages than included in your plan, the additional messages are billed at the end of each month at the same cost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

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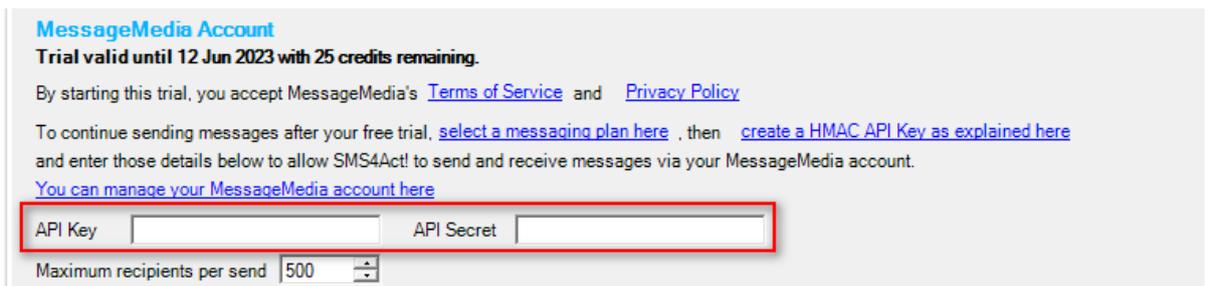
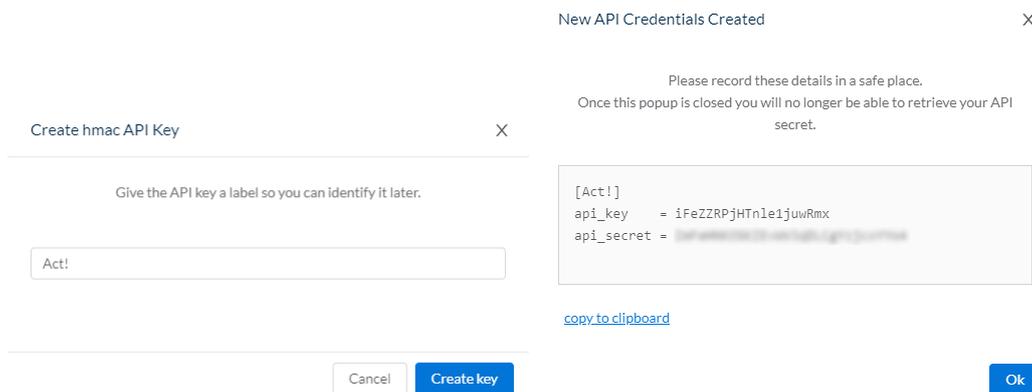
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Creating an API key & secret

After creating a MessageMedia account, login to <https://hub.messagemedia.com> with your email address and MessageMedia password; click “Settings”; then “API Settings”. Under HMAC Authentication, click “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).

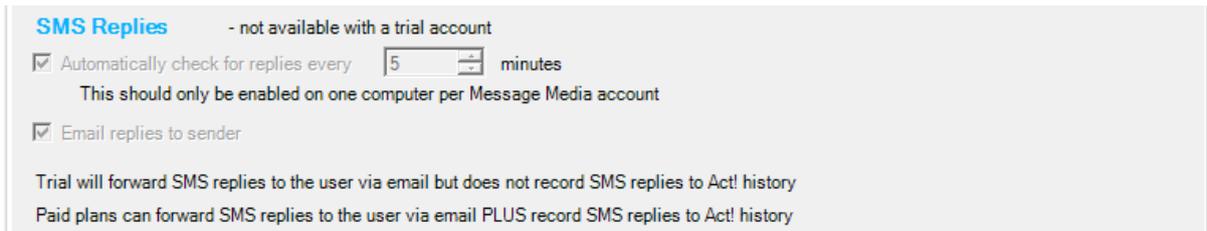


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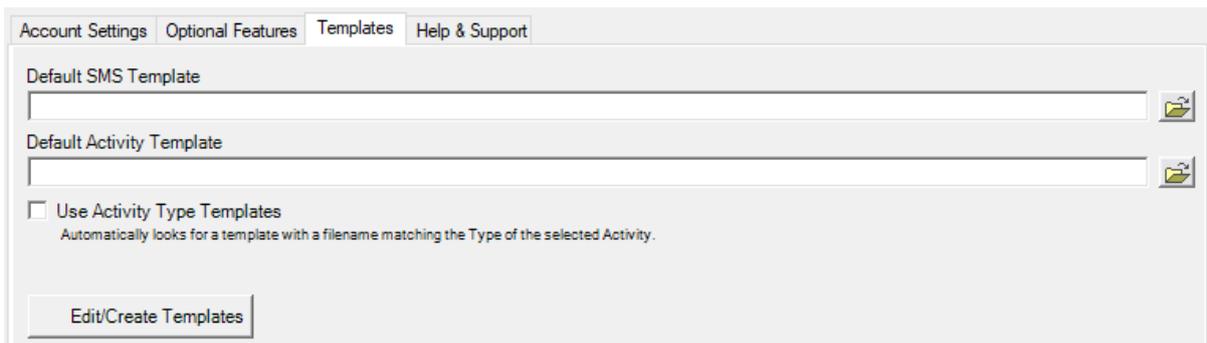
Replies

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.

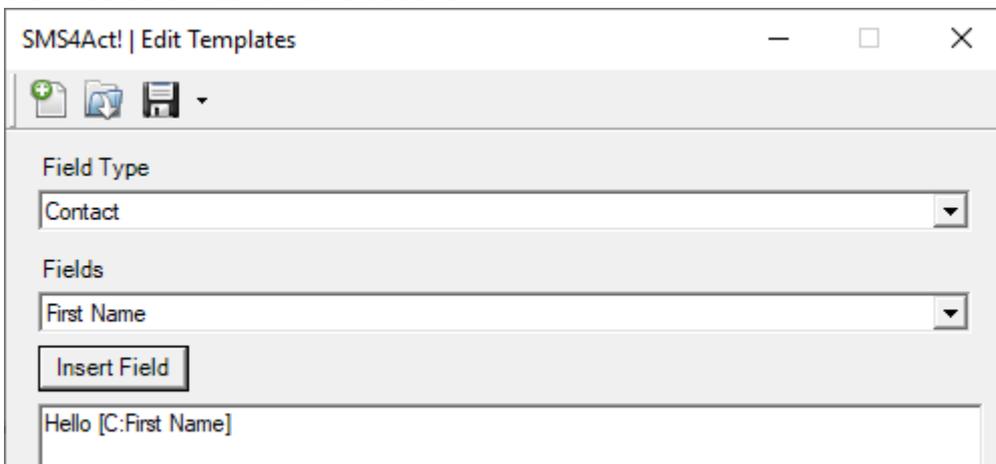


Templates

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



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.

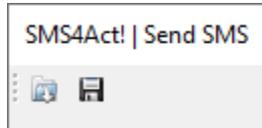


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You can also select Field Type = Activity to insert activity fields, such as Start Time, into a message.

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.



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 <https://sms4act.com/downloads> 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.