

SMS MARKETING

(ENTERPRISE, BUSINESS, POS)

SMS MARKETING.

IQ SMS allows you to send SMS's to your clients from within your IQ system.

You can use this to inform your clients of Order Collection, Job card Status, Birthday Notices, Events, Promotions, Competitions, Special offers.

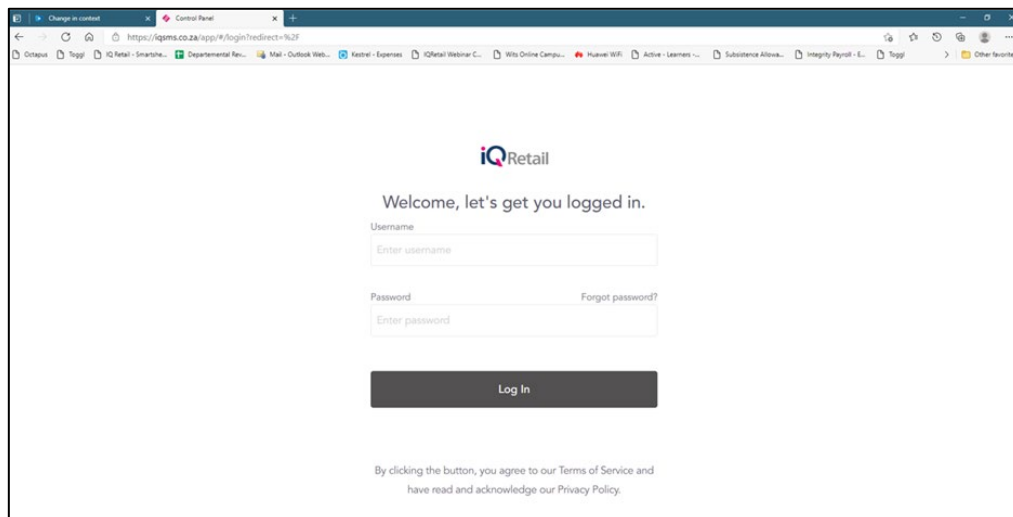
Bulk SMS bundles can simply be purchased online via Credit Card.

With almost a cell phone per person in South Africa, there isn't a more effective way to reach any target market SMS message.

PLEASE NOTE: Internet access is a requirement.

A few reasons why SMS Marketing:

- Immediate
- Mobile-friendly
- Eco-friendly
- Simple



You can use this to inform your clients of Events, Promotions, Competitions Special offers.

Bulk SMS bundles can simply be purchased online via Credit Card.

SMS MARKETING SUMMARY WEBSITE

- Register Now
- Login
- Enable the API & FTP Keys
- Online Payments
- Billing Summary
- Credit Card Details

MODULE PARAMETERS

Setup Details

- Template

DEBTORS MAINTENANCE

- SMS Marketing enable.
- Cell phone Number

SMS MARKETING

- Filters
- Templates
- Process
- Reports

HOW TO PURCHASE SMS BUNDLE'S

Login to www.igsms.co.za. Create an account and password.

The password must be 12 characters minimum and use at least one numeric, one lower case and one uppercase character (avoid using characters like #, <, >, &, ~, \ in your password)

You may now purchase your bulk SMS's. Prices may change, all prices displayed on website is exclusive of Vat.

Select the Buy Now option and then specify the number of credits to buy.

Choose between 500 and 100000 to purchase.

Once you have completed your purchase, simply go to the SMS Marketing module in your IQ system and setup the website detail.

Buy Now

[Credit Amount](#) > [Billing Details](#) > [Payment Method](#)

Credits *

Enter amount of credits

Credit amount required

Package	Price (ZAR)
500 - 5,000	0.40
5,001 - 250,000	0.30
250,001 or more	Contact daphne.jacobs@kerridgecs.com

Order Summary

Credits	0
Cost of Credits	R0.00
VAT 15%	R0.00
TOTAL	R0.00

[Proceed to Billing](#)

ENABLE THE API & FTP KEYS

The steps on how to enable the API keys are listed below *Remember to keep the credentials for both APIs the same:

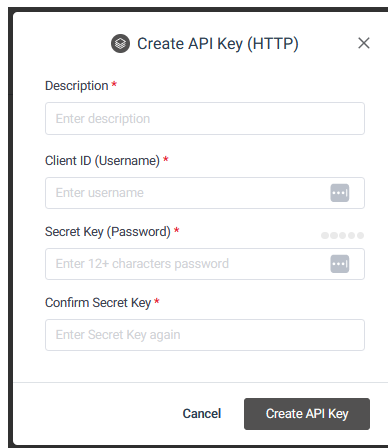
- Log in and click on 'Settings' in the left-hand side menu.
- Click on 'API Keys'
- Click '+Create API Key' and select the 'HTTP' option (The HTTP API is the channel you have been using for the other users).

Create API Key (HTTP)

Would you like to **choose your own** set of credentials, or have secure credentials **auto-generated** for you?

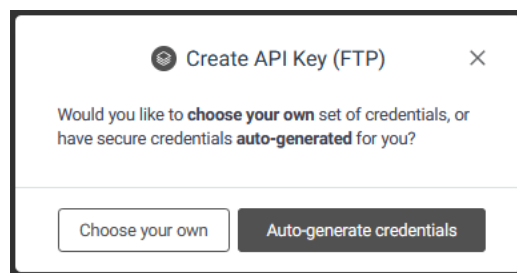
[Choose your own](#) [Auto-generate credentials](#)

- You will be prompted to create credentials and given two options: 'Choose your own' and 'Generate new credentials'.
- (HTTP API Key)



A modal window titled "Create API Key (HTTP)" with a close button (X) in the top right corner. It contains four input fields: "Description *" with placeholder "Enter description", "Client ID (Username) *" with placeholder "Enter username" and a copy icon, "Secret Key (Password) *" with placeholder "Enter 12+ characters password", and "Confirm Secret Key *" with placeholder "Enter Secret Key again". At the bottom are "Cancel" and "Create API Key" buttons.

- F. These credentials will not affect the login credentials of the account – they will apply to the API only.



A modal window titled "Create API Key (FTP)" with a close button (X) in the top right corner. It contains the text: "Would you like to **choose your own** set of credentials, or have secure credentials **auto-generated** for you?". At the bottom are two buttons: "Choose your own" and "Auto-generate credentials".

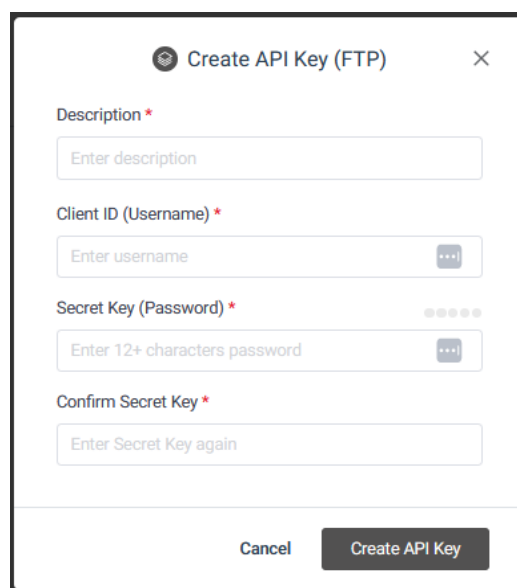
Select 'Choose your own', then set a custom username and password for the API.

The password must be 12 characters minimum and use at least one numeric, one lower case and one uppercase character (avoid using characters like #, <, >, &, ~, \ in your password)

Click "Update Credentials" to save the changes.

Next, click "+Create API Key" and select the 'FTP' option then refer to steps 4 above and ensure you use the same username and password as the HTTP API.

Repeat Step D (FTP API Key)



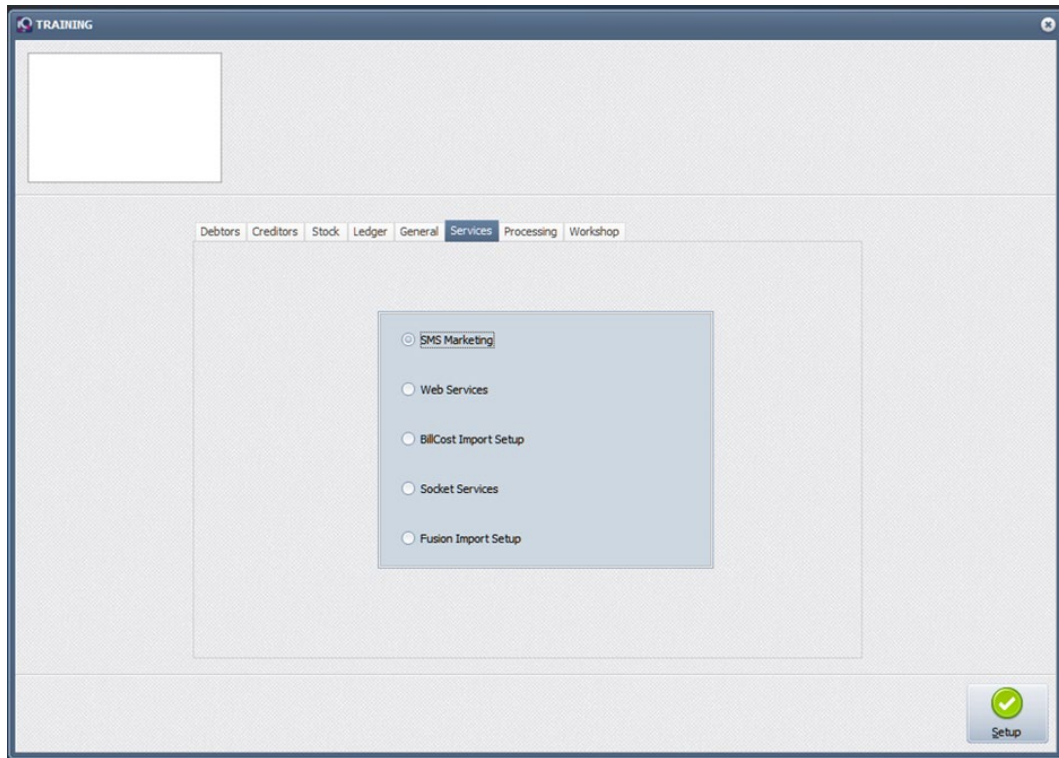
A modal window titled "Create API Key (FTP)" with a close button (X) in the top right corner. It contains four input fields: "Description *" with placeholder "Enter description", "Client ID (Username) *" with placeholder "Enter username" and a copy icon, "Secret Key (Password) *" with placeholder "Enter 12+ characters password", and "Confirm Secret Key *" with placeholder "Enter Secret Key again". At the bottom are "Cancel" and "Create API Key" buttons.

SETUP IN IQ ENTERPRISE

From the Main menu → Utilities → Setup → Module Parameters → Services.

Select SMS Marketing and select Setup.

MODULE PARAMETERS

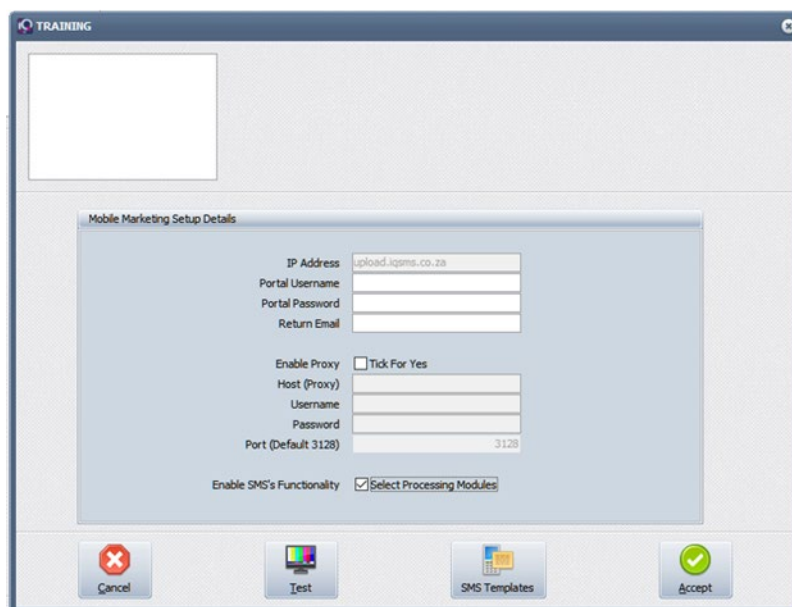


Selecting the setup option allows one to configure and set up the SMS marketing option.

SMS MARKETING SETUP DETAILS

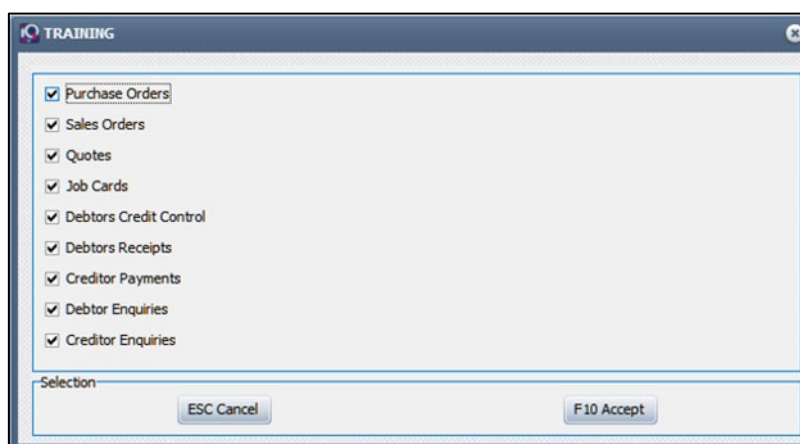
Mobile Marketing Setup Details

Fill in the Portal Username and Password.



IP ADDRESS	The IP address field displays the server name or IP address of the SMS marketing server or host name. The default IP address or server name is www.iqsms.co.za.
PORTAL USERNAME	The portal username field is where the user name must be entered for the authentication against the host server of the SMS marketing.
PORTAL PASSWORD	The portal password field is where the password must be entered for the authentication against the host server of the SMS marketing.
RETURN EMAIL	The return email is the email address that will be used when a reply is generated from the SMS that was sent.
ENABLE PROXY	The enable proxy option allows one to configure a proxy server if there is one located on the network.
HOST (PROXY)	The host proxy is where the proxy server's details are entered. This means that the specific proxy server's IP address or name must be entered.
USER NAME	The username field is where the username must be entered for the authentication against the proxy server.
PASSWORD	The password field is where the password must be entered for the authentication against the proxy server.
PORT (DEFAULT 3128)	The port field indicates the port number that will be used for the proxy server to communicate when trying to access the internet. By default, with most proxy servers the default port number is 3128.
ENABLE SMS'S FUNCTIONALITY	Choose which module must have the SMS option available. Choose from: purchase orders, sales orders, quotes, job cards, debtors credit control, debtors receipts, creditors payments, debtors enquiries, creditors enquires.

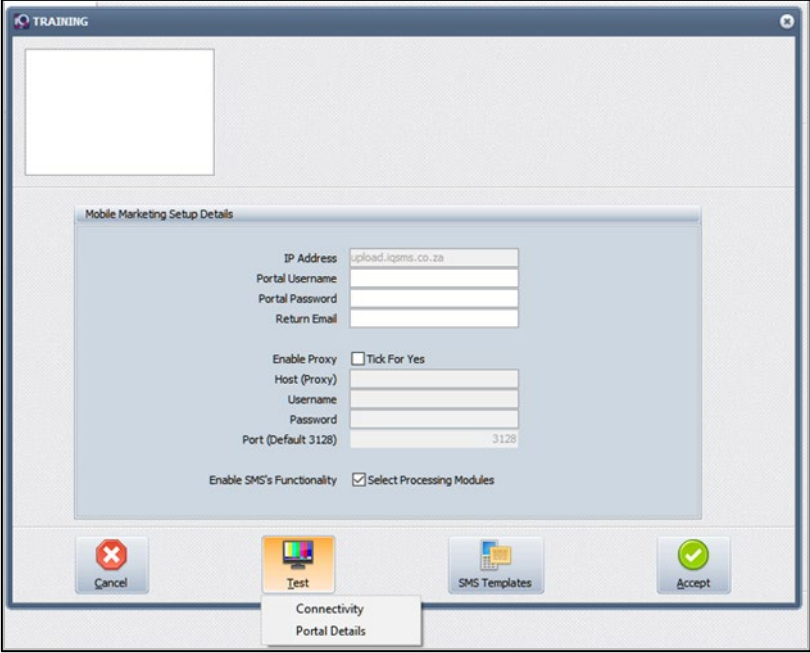
SMS FUNCTIONALITY



Select F10 Accept to close the screen.

TEST OPTIONS

Once the portal username and password have been entered select the Test button.



The screenshot shows a 'TRAINING' window with a 'Mobile Marketing Setup Details' dialog box. The dialog box contains the following fields and options:

- IP Address:
- Portal Username:
- Portal Password:
- Return Email:
- Enable Proxy: ☐ Tick For Yes
- Host (Proxy):
- Username:
- Password:
- Port (Default 3128):
- Enable SMS's Functionality: ☒ Select Processing Modules

At the bottom of the dialog box are four buttons: 'Cancel' (red X icon), 'Test' (orange icon with a computer monitor), 'SMS Templates' (blue icon with a document), and 'Accept' (green checkmark icon). A tooltip is visible over the 'Test' button, showing 'Connectivity' and 'Portal Details'.

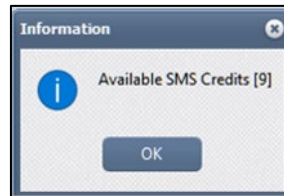
CONNECTIVITY

The connectivity will check that you are able to communicate with the website.



PORTAL DETAILS

To Test the portal detail will check the credit availability.



SETUP SMS MARKETING FOR DEBTORS MAINTENANCE

From the Main menu → Debtors → Maintenance → Select a Debtors → Edit
fill in a Cell phone number under the Account Information Tab.

 A screenshot of the 'Debtors Maintenance' form. The 'Account Information' tab is selected. The form is divided into two sections: 'Debtor Information' and 'Contact Information'.

Under 'Debtor Information':

- Account Number: BLU001
- Name: Blue
- Alternative Name: (empty)
- Trading As: (empty)
- Company Registr No: (empty)
- Tax (VAT) no: (empty)
- Vat Status: Normal Vat Client (dropdown)

 Under 'Contact Information':

- Title: (empty)
- Initials: (empty)
- I.D. Number: (empty)
- Contact: Harry
- Birthday: (empty)
- Cellphone Number: 084 000 0000
- E-Mail Address: Lisa.Dimech@kerridgecs.com
- Fax Number: (empty)
- Telephone Number 1: (empty)
- Telephone Number 2: (empty)

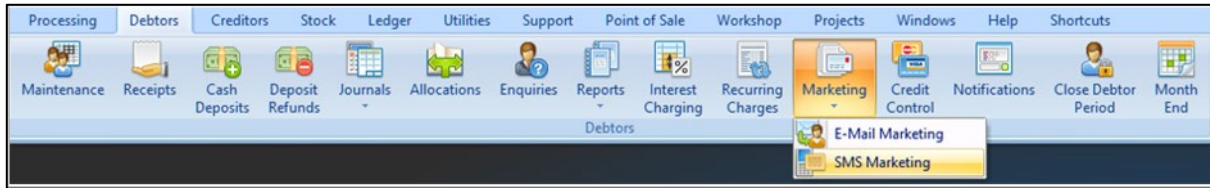
Select SMS Marketing under the Additional Information Tab.

 A screenshot of the 'Debtors Maintenance' form with the 'Additional Information' tab selected. The 'Additional Settings' section contains the following fields:

- Debtor Group: 002 (dropdown) - Debtors Group 2 - Silver Client
- Debtor Sub Group: 004 (dropdown) - Debtors Sub Group 4
- On Hold: ☐ Click for Options Set Dormant (Days) 0
- Status: (empty)
- Expiry Date: (empty)
- Default Layout: Layout 1 (dropdown)
- Notification: ORDER NUMBER (dropdown)
- Loyalty Account: (empty)
- E-Mail Documents: Tick for Yes ☐
- Auto Email Invoices: Tick for Yes ☐
- SMS Marketing: Tick for Yes ☒
- Require Inv Order No: Tick for Yes ☐
- Enable Signature Pad: Tick for Yes ☐

Select Accept to close and accept details.

From the Main menu → Debtors → Marketing → SMS Marketing

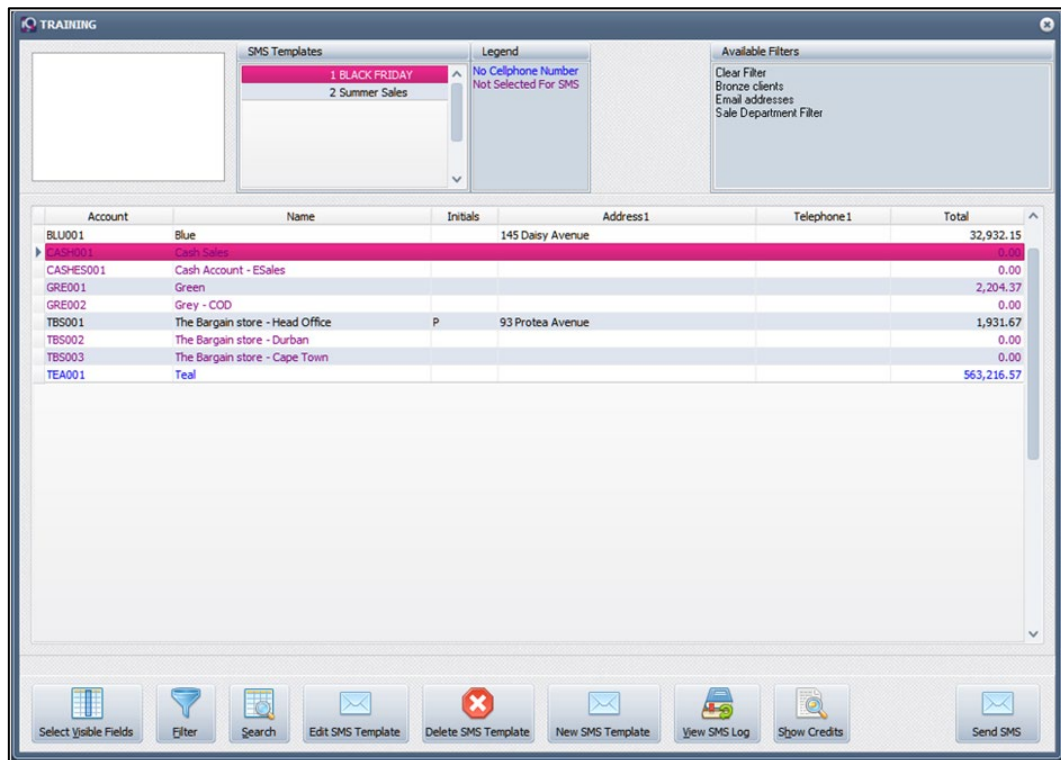


NEW SMS TEMPLATE

Create a filter to select the Debtors list.

Check the Legend colour to ensure that SMS Marketing has been selected and a valid cell number has been entered.

Check your credit by using the Show Credits button.



Use the available field (Double Click) to complete your SMS.

Select Accept to complete SMS Template.

Maximum of 459 Character per SMS.

The screenshot shows the 'TRAINING' window for creating an SMS template. At the top, there is a list of 'Available Expression Fields - Double Click to use' including fields like ACCESSLEVEL, AccNumSupplier, ACCOUNT, ACCOUNTTYPE, AccVerification, AccVerifyModules, ACCVERIFYTWOFACOR, ADDRESS1, ADDRESS2, ADDRESS3, ADDRESS4, AdvertisingAllowance, AGE, ALLOWCASHSALE, ALLOWSCED, ALTERNATIVE_NAME, AMOUNTLASTDEBIT, AMOUNTLASTPAYMENT, AREA, AutoOrderFrequency, AutoOrderStart, BANKACCTYPE, BANKERS, BANKNO, BANKPROOF, BANKSUB, and BFWID. Below this is the 'Template Details' section. The 'Description' field contains 'BLACK FRIDAY'. The 'Message Text (Maximum 459 Characters)' field contains the text: 'Dear [TITLE] [NAME], We are have a black friday sale. 50% discount on limit items. Your outstanding total is[TOTAL]. Regards IQ Tea'. The 'Credit' field is set to '1'. At the bottom, there are 'Cancel' and 'Accept' buttons.

Select the Template and make sure only debtors display that must receive the sms by creating a filter.

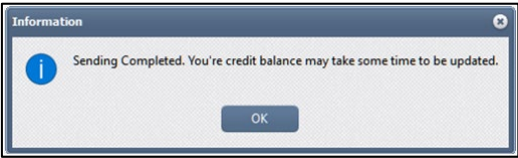
The screenshot shows the 'TRAINING' window for managing SMS templates. At the top, there is a list of 'SMS Templates' with two entries: '1 BLACK FRIDAY' and '2 Summer Sales'. To the right of this list is a 'Legend' section with the text 'No Cellphone Number' and 'Not Selected For SMS'. Further right is an 'Available Filters' section with a list of filters: 'Clear Filter', 'Bronze clients', 'Email addresses', and 'Sale Department Filter'. Below these sections is a table with columns: Account, Name, Initials, Address1, Telephone1, and Total. The table contains three rows of data:

Account	Name	Initials	Address1	Telephone1	Total
BLU001	Blue		145 Daisy Avenue		32,932.15
TBS001	The Bargain store - Head Office	P	93 Protea Avenue		1,931.67
TEA001	Teal				563,216.57

At the bottom of the window, there is a toolbar with icons for 'Select Visible Fields', 'Filter', 'Search', 'Edit SMS Template', 'Delete SMS Template', 'New SMS Template', 'View SMS Log', 'Show Credits', and 'Send SMS'.

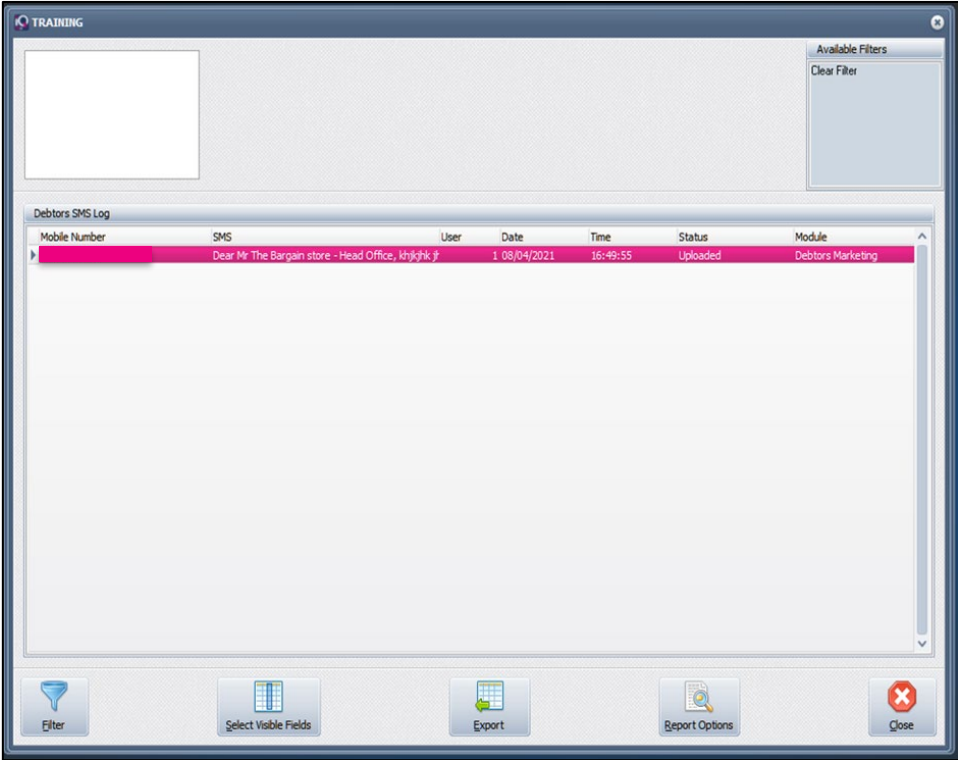
Select Send SMS.

The screenshot shows a 'Status' window with a single line of text: 'Connecting and Sending'.



VIEW SMS LOG

The SMS log will display a log of SMS details.



--- End of Document ---