



# CLIENT PORTAL USER MANUAL

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# 1 Login

## Purpose

Client **login**, by entering correct username and password.

Figure 1-1 Login

## 1.1 Steps to Login

1. From the web-portal, click **“Login”**. Figure 1-1 is displayed
2. Enter valid username and password.

### NOTE:

*This is the username and password created at Registration.*

3. Click on **Login** button.

## 1.2 Constraints

1. Neither of the field should be null.

# 2 Recharge (SMS Credit Top-up)

## Purpose

Users need to buy SMS credit in order to use the text messaging service on IvySMS. Users recharge their SMS account using payment gateways supported.

## Recharge

Assigned Plan :	Test	<a href="#">View pricing</a>
Amount :	<input type="text" value="Amount *"/>	GBP
Payment Method :	<input type="text" value="Payment Method"/>	
Debit Currency :	<input type="text" value="Pound (GBP)"/>	
<input type="button" value="Proceed"/>		

Figure 2-1 Recharge – Step1

### 2.1 Steps to Recharge Account – SMS Credit Top-up

1. Click on **User Management > Recharge** link from the menu list on the left. Figure 2-1 is displayed.

**NOTE:**

*In this screen user (a third-party developer will see this screen if developer has integrated recharge API into their website. This will be approved by IvySMS administrator.*

2. The screen displays user's currently **Assigned Plan** Name.

Available plans are (See: [www.ivysms.com](http://www.ivysms.com) /Pricing)

- i. Basic – Default user registration
- ii. Standard
- iii. Super
- iv. Ultra
- v. Premium

**NOTE:**

*Every new user registration by default is Basic Plan. If you need to upgrade to a higher plan that affords lower rates per SMS, you need to contact [info@ivysms.com](mailto:info@ivysms.com) to upgrade your plan. **You must provide your Username in your email so IvySMS administrator can upgrade your plan to enjoy more benefits.***

3. Click on **View Pricing** link, it will display the **Pricing** page on [www.ivysms.com](http://www.ivysms.com)
4. Enter the **Amount** of SMS credit to be purchased.

As a guide towards purchasing SMS credits, the table below gives an approximate number of texts (SMS) messages that can be sent for each Rate Plan if a minimum SMS credit amount indicated was purchased based on rates for the United Kingdom.

The **rate per SMS** becomes cheaper as Plan moves higher from Basic > Standard > Super > Ultra > Premium. Premium Plan has the cheapest rates per SMS.

## NOTES:

- i. The table below is based on SMS sent in the UK, to give an idea and guide for SMS Credit recharge (purchase). It might be different for other countries. Please check Pricing per operator per country from the Pricing Page at [www.ivysms.com](http://www.ivysms.com).
- ii. Bear in mind that any amount of credit can be bought (purchased) per Rate Plan. Users are not restricted to the Minimum purchase. The table only shows example of how many text messages that can be sent for each Rate Plan with a minimum purchase in the United Kingdom. Also, remember that the rates become cheaper as Plan moves up from Basic Plan to Premium. To clarify, a user on Basic Rate Plan may decide to by £1,000 worth of SMS Credit at a go. What this means is that the user will send messages for a much longer time before the need to recharge (purchase credits) again.
- iii. **SMS Credits purchased do not expire. It is carried over from month to month.**

Rate Plan	Minimum Purchase (£)	Approximate Number of SMS that can be sent
Basic	£19.95	500
Standard	£38.90	1,000
Super	£379.00	10,000
Ultra	£11,300.00	500,000
Premium	£21,400.00	1,000,000

5. Select Payment method.
6. Select Currency of payment.
7. Click on **Proceed**,
8. Figure 2-2 is displayed.

---

### Paypal Checkout Payment Summary

---

Assigned Plan :	Test
Actual Amount :	£12
Charges :	£0
Fixed Charges :	£0
Total Amount :	£12
Net Amount :	£12

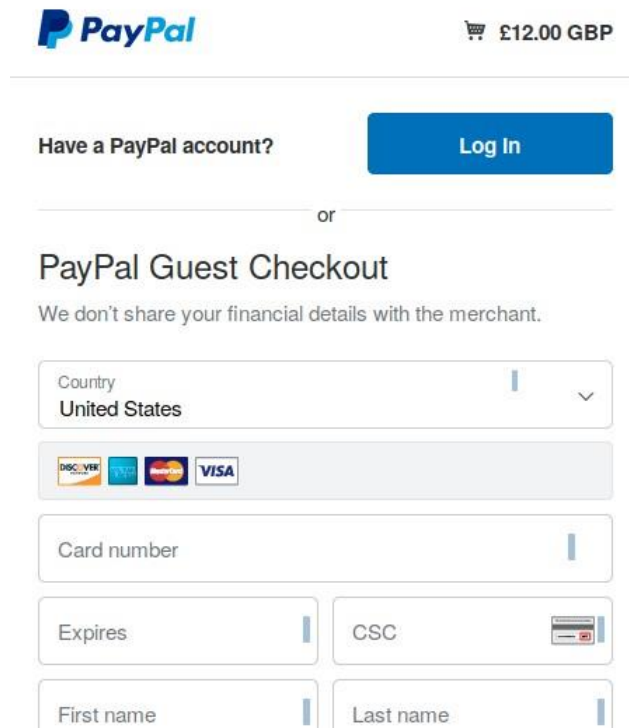
Cancel

Pay with **PayPal**

**Figure 2-2 Recharge – Step2**

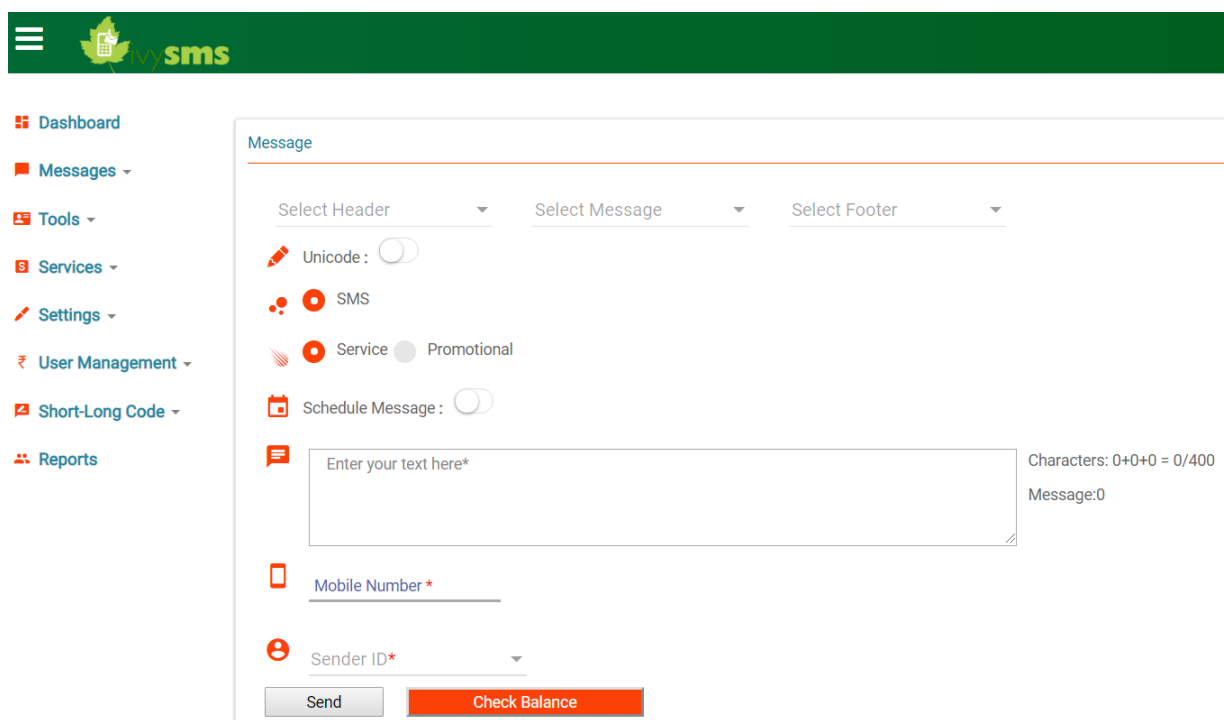
9. It will display payment summary about recharge.
10. Click on **Pay with Paypal**, it redirects to Paypal, and
11. Figure 2-3 is displayed.

12. It will display entered amount. User can pay via Credit/Debit card or directly via Paypal using email credentials.
13. Once Payment is successful, user can begin sending message. Go to **Messages > Single** or **Messages > Bulk** to send messages. See Figure 2-4 below.



The image shows the PayPal Guest Checkout interface. At the top, the PayPal logo is on the left, and a shopping cart icon with '£12.00 GBP' is on the right. Below this, there's a section for account login with the text 'Have a PayPal account?' and a blue 'Log In' button. A horizontal line with the word 'or' in the center separates this from the 'PayPal Guest Checkout' section. Under 'PayPal Guest Checkout', there's a sub-header 'We don't share your financial details with the merchant.' followed by a form. The form includes a 'Country' dropdown menu set to 'United States', a row of payment method logos (Discover, Venmo, Mastercard, Visa), a 'Card number' input field, an 'Expires' input field, a 'CSC' input field with a card icon, and 'First name' and 'Last name' input fields.

**Figure 2-3 Recharge – Step3**



The image shows a web-based SMS messaging interface. The top header is green with a hamburger menu icon, a leaf icon, and the text 'sms'. On the left is a sidebar menu with items: Dashboard, Messages (selected), Tools, Services, Settings, User Management, Short-Long Code, and Reports. The main content area is titled 'Message' and contains several settings: 'Select Header', 'Select Message', and 'Select Footer' dropdowns; a 'Unicode' toggle switch; radio buttons for 'SMS' (selected) and 'Service' (with a 'Promotional' sub-option); a 'Schedule Message' toggle switch; a large text input field with the placeholder 'Enter your text here\*'; and a 'Mobile Number\*' input field. To the right of the text input field, it says 'Characters: 0+0+0 = 0/400' and 'Message:0'. At the bottom, there's a 'Sender ID\*' dropdown menu and two buttons: 'Send' and 'Check Balance'.

**Figure 2-4 Message**

### 3 Dashboard

#### Purpose

The dashboard enables users to see their detailed account information.

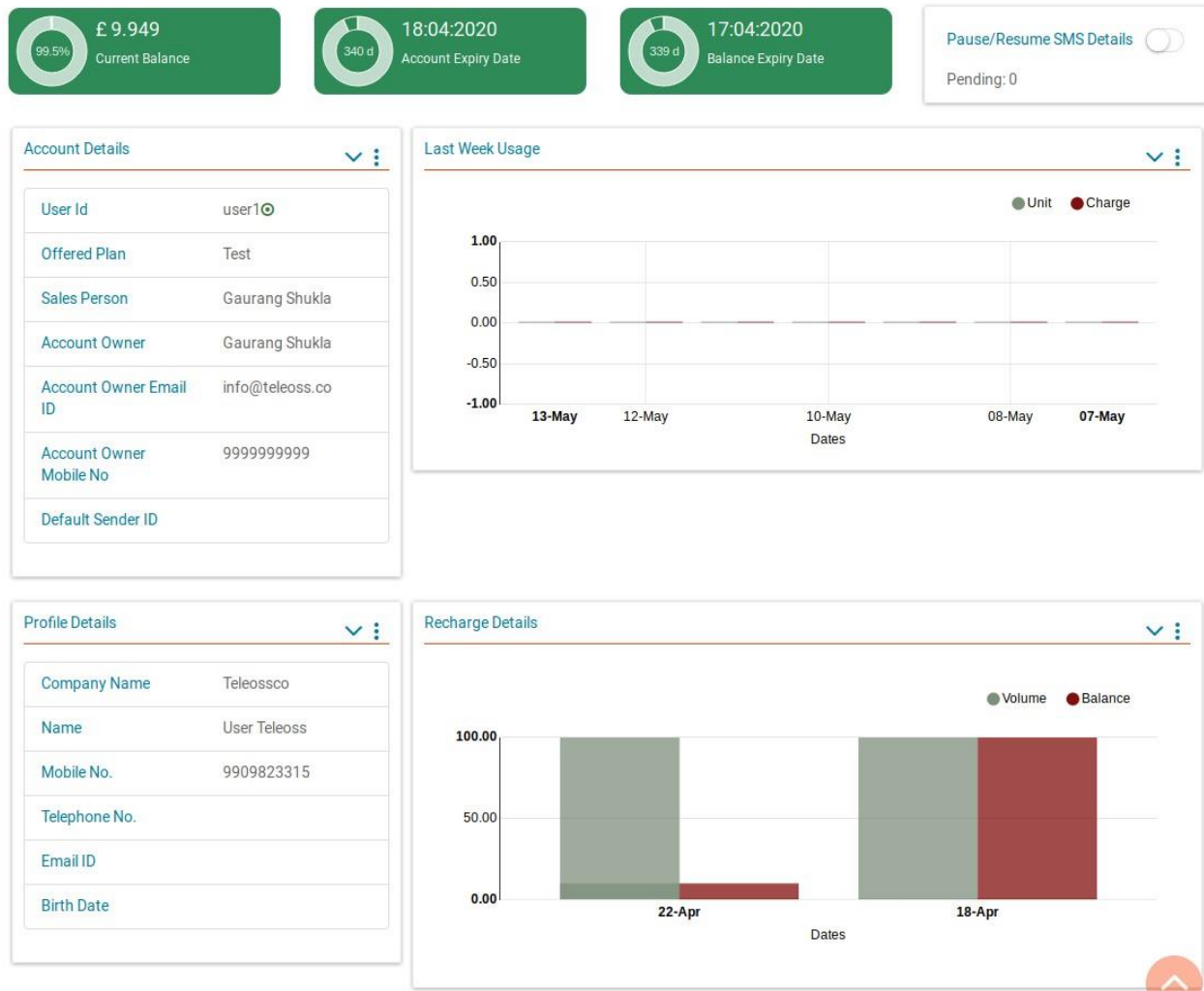


Figure 3-1 Dashboard

Click on **Dashboard** link from menu, Figure 3-1 is displayed.

#### 1. Account Validity Information

On top of the screen, **Current Balance**, **Account Expiry Date** and **Balance Expiry Date**, Pause/Resume flag are displayed.

- The Pause/Resume button enables the user to pause and resume the use of its account.

**NOTE:**

If the user **Pauses** the account, remember to **Resume** in dashboard to continue sending messages otherwise, "sending messages" will fail.



## 2. Account Details

Under this header, User ID, Plan Name, Account owner name, Account owner Email, Account owner Mobile, and SenderID is displayed.

*Tip:*

*Click on three vertical dots on right top corner of the box, to show “More Details”; click on this it will display pop up with more fields*

## 3. Profile Details

Under this header, user’s personal details like name, mobile number, birth date etc. are displayed. *[Tip: Click on three vertical dots on right top corner of the box, to show “More Details”, click on this it will display pop up with more fields]*

## 4. Last Week Usage

This section displays the previous week’s daily SMS usage count.

## 5. Recharge Details

This section displays recharge details (SMS credit purchase /top-up) by an administrator or user via the portal.

*Tip:*

*Click on three vertical dots on right top corner of the box, to show “More Details” it will display more detailed information on recharge (SMS credit purchase) activities.*

# 4 Messages

## 4.1 Single Message

### Purpose

**Single message** option is used, when user needs to send message, to single mobile number (recipient).

Select Header

Select Message

Select Footer

Unicode: ☐

SMS

Service ☐ Promotional ☐

Schedule Message: ☐

Enter your text here\*

Characters: 0+0+0 = 0/550

Message:0

Mobile Number \*

Sender ID\*

Send

Check Balance

**Figure 4-1 Single Message**

Click on **Messages > Single** link from menu it will open Figure 4-1

#### 4.1.1 Steps to use Single Message

- Enter required details.
  - Select Header** and **Select Footer** options lets the user decide, whether to append pre-defined header/footer, to message or not.
  - Select Message** option lets a user decide, to use any pre-defined message content.
  - Message language can be **English** or **Unicode**. In Unicode, there can be any language other than English. If the toggle button is green, then it is Unicode; otherwise, it is English.
  - SMS** can be service type or promotional type.
    - Promotional SMS messages.** This is for product or service promotion. User must ensure that the content follows government and other relevant authorities' guidelines in their country. This can be time of day, duration, content. Promotional SMS' format is also pre-defined.
    - Service messages.** This is the general message (text) sent out to recipients. Service messages are not pre-defined and can be sent at any time.
  - Schedule Message:** Text messages (SMS) can be scheduled to be sent at future dates and/or time.
  - Enter your Message:** User can type message into text area under schedule message field. Here it shows characters count in this format 0+0+0.
    - First digit shows header characters counts.
    - Second digit shows message text characters counts.
    - Third digit shows footer characters counts.

- **Mobile Number:** User enters recipient's mobile phone number.
- **SenderId** can be selected, from given drop down menu.

*NOTE: SenderID must be requested and approved by IvySMS admin before it is active.*

2. Click **Send** button, to send single message, to the recipient (Mobile Number entered).

#### 4.1.2 Constraints for Single Message

1. User can only send message, if user has enough SMS credits balance.

*NOTE: If there is Message Sent failed error, check your balance in the first instance*

## 4.2 Bulk Message

### Purpose

**Bulk Message** option is used, when user needs to send same message, to many people. User can decide upon parameters of message and can send it to target audience.

Click on **Messages > Bulk** link from menu it will open Figure 4-2 .

#### 4.2.1 Steps to use Bulk Message

1. Enter required details.
  - **Add Header/Add Footer** option lets a user decide, whether to append pre-defined header/footer, to message or not.
  - **Message option** lets a user decide, to use pre-defined message content.
  - **Message language** can be English or Unicode. In Unicode, there can be any language other than English.
  - **Message type** can be Normal Message (SMS) or Flash Message. In Flash Message, one pop up menu, containing message, will be displayed. Flash messages are those, which user must see compulsorily. It will be displayed only once and will not be saved in inbox of message, when user closes it.
  - **SMS type** can be service type or promotional type.
    - Promotional SMS messages must be sent in compliance with government and other relevant authorities' guidelines for product and service promotion. This can be time of day, duration, content. Promotional SMS' format is pre-defined.
    - Service messages are not pre-defined and can be sent at any time.
  - **Remove Duplicate Numbers:** Duplicate Numbers will be removed if it's turned on (recommended).
  - **Schedule Message:** Text messages (SMS) can be scheduled to be sent at future dates and/or time.

- **Enter your text here:** User can type message into text area under schedule message field. Here it shows characters count in this format 0+0+0.
    - First digit shows header characters count.
    - Second digit shows message text characters count.
    - Third digit shows footer characters count.
  - User can enter numbers, in given text area for Recipient numbers.
  - **SenderId** can be selected, from given drop down menu.
    - *[NOTE: SenderID must be requested and approved by IvySMS admin before it is active].*
2. Click on Send button, to send bulk message, to recipients (Mobile Numbers entered).

The screenshot displays the 'Bulk Message' interface. At the top, there are three dropdown menus: 'Select Header', 'Select Message', and 'Select Footer'. To the right is a 'Pause/Resume SMS Details' toggle switch, currently in the 'Pending: 0' state. Below these are several settings: 'Unicode' (disabled), 'SMS' (selected), 'Service' (selected), 'Promotional' (disabled), 'Remove Duplicate' (enabled), and 'Schedule Message' (disabled). The main section contains a large text area labeled 'Enter your text here\*' with a character count 'Characters: 0+0+0 = 0/550' and a message count 'Message:0'. Below this is another text area for recipient numbers with a placeholder '[Mobile Numbers]\* should be separated by , or ; or newline or space'. At the bottom, there is a 'Sender ID\*' dropdown menu and two buttons: 'Send' and 'Check Balance'.

**Figure 4-2 Bulk Message**

### 4.2.2 Constraints for Bulk Message

1. User can send message, if user has enough SMS credits balance.

*NOTE: If there is Message Sent Failed error, check your balance in the first instance*

## 4.3 Group Message

### Purpose

**Group Message** is used, when user needs to send same message, to different defined groups of recipients.

**Figure 4-3 Group Message**

Click on **Messages > Group** link from menu it will open Figure 4-3.

#### 4.3.1 Steps to use Group Message

1. Enter required details.
  - **Add Header/Add Footer** option lets a user decide, whether to use a pre-defined header/footer, to the message or not.
  - **Message option** lets a user decide, to use a pre-defined message content.
  - **Message language** can be English or Unicode. In Unicode, there can be any language other than English.
  - **Message type** can be Normal Message (SMS) or Flash Message. In Flash Message, one pop up menu, containing message, will be displayed. Flash messages are those, which user must see compulsorily. It will be displayed only once and will not be saved in inbox of messages, when user closes it.
  - **SMS type** can be service type or promotional type.
    - Promotional SMS messages must be sent in compliance with government and other relevant authorities' guidelines for product and service promotion. This can be time of day, duration, content. Promotional SMS' format is pre-defined.
    - Service messages are not pre-defined and can be sent at any time.

- **Remove Duplicate Numbers:** Duplicate Numbers will be removed if it's turned on (recommended).
- **Schedule Message:** Text messages (SMS) can be scheduled to be sent at future dates and/or time.
- **Enter your text here:** User can type message into text area under schedule message field. Here it shows characters count in this format 0+0+0.
  - First digit shows header characters count.
  - Second digit shows message text characters count.
  - Third digit shows footer characters count.
- User can enter numbers, in given text area for Recipient numbers.
- User can select multiple groups, for Recipient numbers.
- **SenderId** can be selected, from given drop down menu.
- *[NOTE: SenderID must be requested and approved by IvySMS admin before it is active].*

2. Click Send button, to send bulk message, to selected groups of mobile numbers.

#### 4.3.2 Constraints for Group Message

1. User can send the message(s), if the user has enough SMS credits balance.

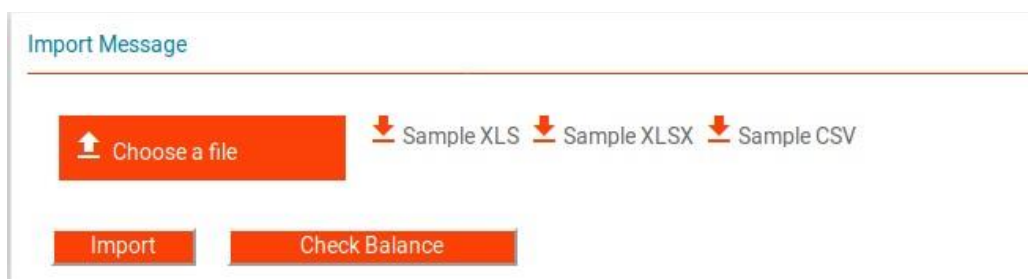
*NOTE:*

*If there is Message Sent Failed error, check your balance in the first instance*

## 4.4 Import Message

### Purpose

**Import SMS** option lets the user import ***pre-prepared SMS from a file, with pre-defined format***. The setup is shown in the screen shot given below.



**Figure 4-4 Import Message**

Click on **Messages > Import** link from menu it will open Figure 4-4

#### 4.4.1 Steps to Import Message

1. Click on **Choose a file** button, to select file, to import message(s).

*[NOTE: It is recommended to first download a desired “Sample file” which can be: XLS, XLSX or CSV, depending on your preference. Then add your data/information on the downloaded sample file, save it somewhere on your computer. Then return to the screen to “Choose a file” – that saved file – and then Import it]. This makes the system works better because of consistent formatting.*

2. Click on **Import button**, system will display few records, as shown in Figure 4-5. Message will be sent to recipients (mobile number) with their specific message in the file. For example, Mobile Number 9999999999 will receive the Message: “Test Report”. In the file, different message can be composed for different mobile number(s). This is useful if user already has pre-prepared messages for an audience (recipients) with different mobile numbers and their messages. It is only imported here to be sent. Done in 1 minute! Easy!

The screenshot shows the 'Import Message' interface. It includes several toggle switches for 'Unicode', 'SMS', 'Service' (with 'Promotional' selected), 'Remove Duplicate', and 'Schedule Message'. There is a 'Sender ID' dropdown menu and three buttons: 'Back', 'Send', and 'Check Balance'. On the right, there is a 'Pause/Resume SMS' toggle and a 'Details' link, with a 'Pending: 0' status. Below these is a table with two columns: 'Mobile No' and 'Message'. The table contains one record with '9999999999' and 'Test import'. At the bottom, it says 'Total 1 records found.'

Mobile No	Message
9999999999	Test import

Total 1 records found.

**Figure 4-5 Click Import Button**

3. Enter required details.
  - **Message language** can be English or Unicode. In Unicode, there can be any language other than English.
  - **Message type** can be Normal Message (SMS) or Flash Message. In Flash Message, one pop up menu, containing message, will be displayed. Flash messages are those, which user must see compulsorily. It will be displayed only once and will not be saved in inbox of messages, when user closes it.
  - **SMS type** can be service type or promotional type.
    - Promotional SMS messages must be sent in compliance with government and other relevant authorities' guidelines for product and service promotion. This can be time of day, duration, content. Promotional SMS' format is pre-defined.
    - Service messages are not pre-defined and can be sent at any time.
  - **Remove Duplicate Numbers:** Duplicate Numbers will be removed if it's turned on (recommended).
  - **Schedule Message:** Text messages (SMS) can be scheduled to be sent at future dates and/or time.

- **Enter your text here:** User can type message into text area under schedule message field. Here it shows characters count in this format 0+0+0.
  - First digit shows header characters count.
  - Second digit shows message text characters count.
  - Third digit shows footer characters count.
- User can enter numbers, in given text area for Recipient numbers.
- User can select multiple groups, for Recipient numbers.
- **SenderId** can be selected, from given drop down menu.
- *[NOTE: SenderID must be requested and approved by IvySMS admin before it is active].*

4. Click Send button, to send messages to defined mobile number for each row (message) in the file (work sheet).

#### 4.4.2 Constraints

1. User can send the message(s), if the user has enough SMS credits balance. *[NOTE: If there is Message Sent Failed error, check your balance in the first instance]*

## 4.5 Custom Excel Bulk SMS

### Purpose

User can import SMS, from a file with different types of format, by using **Custom Excel Bulk SMS** option. No pre-defined format of file is required here to import pre-prepared SMS messages.

If an Excel file is having different worksheets, with different formats on each work sheet, such files can still be imported for the purpose of sending SMS to recipients.



**Figure 4-6 Custom Excel Import Messages**

Click on **Messages > Custom Excel** link from menu Figure 4-6 is displayed.

#### 4.5.1 Steps to Import Custom Excel Bulk SMS

1. Click **Choose a file** button, to select file, to import message(s).

*NOTE: It is recommended to first download a desired "Sample file" which can be: XLS, XLSX or CSV, depending on your preference. Then add your*



data/information on the downloaded sample file, save it somewhere on your computer. Then return to the screen to “**Choose a file**” – that saved file – and then Import it. This makes the system works better because of consistent formatting.

2. Click **Import** button.
3. Figure 4-7 is displayed.

Excel Import Message

Select Sheet\*

Sheet1

Select Mobile No.field\*

Pause/Resume SMS Details

Pending: 0

All Rows

Selected Rows

Unicode:

SMS

Service

Promotional

Remove Duplicate:

Schedule Message:

Sender ID\*

Message Field

mobilenno

name

address

xyz

Message

mobilenno	name	address	xyz	Message
8888698785	abc10	abc20	ABC30	
8888698786	abc11	abc21	ABC31	
8888698787	abc12	abc22	ABC32	
8888698788	abc13	abc23	ABC33	
8888698789	abc14	abc24	ABC34	

Back

Send

Check Balance

**Figure 4-7 Import**

4. **Select Sheet:** Select the worksheet you want from given list of sheets in the drop-down box, for a selected file.
5. **Select Mobile Number field,** from given list of fields in the drop-down.

6. Choose if **ALL rows** or **SELECTED rows** in the selected sheet.
7. Enter row number, to which message need be sent.
8. Select or enter other required details as in Group Message and Import Message.
9. Assign message fields, in Message content text area.
10. Click on Send button, to send SMS to selected rows, from Excel sheet.

## 4.6 Purge SMS

### Purpose

**Purge SMS** is an option to immediately stop a message/queue of messages from sending for any reason by the user. A use case to purge and SMS can be if the user wants a message delivered in one hour to a recipient or recipients and in the unlikely scenario of message was not sent in the stipulated time (one hour), there is no point sending it after one hour because it won't be fit for purpose because it has passed the time it would be useful. In this scenario, the SMS can be purged. Another use case is: if the user changes his/her mind from sending the message and want to cancel, the Purge SMS tool can be used. If the SMS is cancelled at this stage, the message won't be charged, and the user's credit balance is unaffected.

Click on **Messages > Purge SMS** link from menu, Figure 4-8 is displayed.

The screenshot shows a web interface titled "Purge SMS Details". Below the title is a table with the heading "SMS List". The table has two columns: "Queue Time" and "No. of pending SMS". The table is empty, with the text "No records found" displayed. Below the table is a pagination control showing "1" of "10" records. At the bottom of the interface is a red button labeled "Purge SMS".

**Figure 4-8 Purge SMS**

### Users

End user and sub user of an end user can access an option to purge SMS.

#### 4.6.1 Steps to Purge SMS

1. Click on the check box, from list of queued messages.
2. Click on Purge SMS, to stop message sending.

#### 4.6.2 Constraints

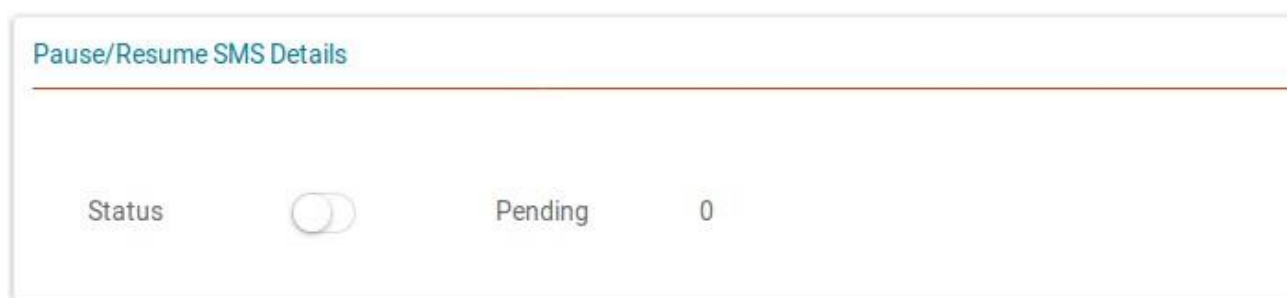
Purge SMS works for messages, with status busy or pending. It does not work with the messages, which have already been sent.

## 4.7 Pause/Resume SMS

### Purpose

**Pause/Resume SMS** option is used to pause message (delay the message from sending). A paused message can be resumed also. That is, the user can stop/delay message from sending and send it later at a time the user chooses by using Pause/Resume SMS option.

Click on **Messages > Pause/Resume** link from menu, Figure 4-9 is displayed. An end user pause sending a message as well as the sub-users.



**Figure 4-9 Pause/Resume SMS**

### 4.7.1 Steps to Pause/Resume SMS

1. Click on Pause button, to stop message from sending.
2. Click on Resume button, to resume message sending.

## 5 Tools

### 5.1 Phone Book

### Purpose

User can add new contact in an address book, as well as, he can search for any existing contact, from an address book.

Click on **Tools > Phone Book** link from menu, Figure 5-1 is displayed

Phone Book

Quick Search :

Name/Number

List of Contacts

Advance Search

Add Contact

Import Contacts

**Figure 5-1 Phone Book**

From above screen **Type name or mobile number**, system will display contact list based on search criteria, as shown in Figure 5-2.

Phone Book

Quick Search :

Name/Number  
muke

List of Contacts

Mukesh

Advance Search

Add Contact

Import Contacts

**Figure 5-2 Quick Search Result**

Click on name from above search result, system will display, Contact Details, as shown in Figure 5-3.

Phone Book

Quick Search :

Name/Number  
muke

List of Contacts

Advance Search

Add Contact

Import Contacts

	Group Name	First Name	Last Name	Mobile No	Email Id	Start Date	End Date	Anniversar y Date	Birth Date	Wishes	Status	Remark
<input type="checkbox"/>	Test	Mukesh		+9199098 23315					30:07:198 4 00:00:00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Add

CSV

Total 1 records found.

Delete

Delete All

**Figure 5-3 Contact Details**

From above screen, user can carry out the following actions:

- User can make active/inactive this contact by clicking on the toggle button under **Status column**.
- User can delete multiple contacts by using check marks and click on Delete button.
- User can delete all the searched contacts by clicking on “Delete All” button.

Click on **Advance Search** button, system will display Figure 5-4.

The screenshot shows the 'Phone Book' application's 'Advance Search' form. At the top, there is a 'Select Group' dropdown menu. Below it, there are four input fields for 'First Name', 'Last Name', 'Mobile No', and 'Email Id'. Further down, there is a 'Remark' field and five date range fields: 'StartDate From', 'StartDate To', 'EndDate From', and 'EndDate To'. At the bottom left, there are two orange buttons: 'Back' and 'Search'.

**Figure 5-4 Advance Search**

To search for a specific contact, enter required details, as per criteria given. Click on **Search** button, it will display search result as shown in Figure 5-5.

The screenshot shows the 'Phone Book' application's search results. The 'Select Group' dropdown is set to 'Test'. Below the search filters, there are two orange buttons: 'Back' and 'Search'. The results are displayed in a table with the following columns: Group Name, First Name, Last Name, Mobile No, Email Id, Start Date, End Date, Anniversary Date, Birth Date, Wishes, Status, and Remark. There are two records in the table. The first record has a checkbox, 'Test' as the group name, 'mukesh' as the first name, and '+4478862 15909' as the mobile number. The second record has a checkbox, 'Test' as the group name, 'Mukesh' as the first name, and '+9199098 23315' as the mobile number. Below the table, there is a pagination bar showing '1' of 10 records. At the bottom left, there is a 'CSV' button and a 'Total 2 records found.' message. At the bottom right, there are two orange buttons: 'Delete' and 'Delete All'.

	Group Name	First Name	Last Name	Mobile No	Email Id	Start Date	End Date	Anniversary Date	Birth Date	Wishes	Status	Remark
<input type="checkbox"/>	Test	mukesh		+4478862 15909						<input type="checkbox"/>	<input checked="" type="checkbox"/>	Add
<input type="checkbox"/>	Test	Mukesh		+9199098 23315					30:07:198 4 00:00:00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Add

**Figure 5-5 Advance Search Result**

### 5.1.1 Add Contact

Click on “Add Contact” as shown in Figure 5-2 and Figure 5-6 is displayed.

**Add Contact**

Note: This will check mobile number or email for contacts group wise

☒ Not Allow Duplicate
 ☐ Allow Duplicate
 ☐ Allow Duplicate But Remove Old

Select Group\* ▼

First Name\* \_\_\_\_\_ Last Name \_\_\_\_\_ Mobile No \_\_\_\_\_

Email Id \_\_\_\_\_ Remark\* \_\_\_\_\_

Birth Date \_\_\_\_\_ Anniversary Date \_\_\_\_\_ Wishes: ☐

Start Date \_\_\_\_\_ End Date \_\_\_\_\_ Status: ☒

**Back** **Save**

**Figure 5-6 Add Contact**

Select group, as well as enter first name and other required details.

**Optional:** Enter birth date as well as, anniversary date, to send good wishes to specific person. Click on Save button, to add new contact.

### 5.1.2 Import Contact

To import contacts, click on “**Import contacts**” as in Figure 5-2 and Figure 5-7 is displayed.

**Import Contacts**

Note:

1) Recommended upload limit is 10000 addresses. It would take approximately 2 minute to upload.

2) Marked with red colours are require filed in file and you can enter only mobile number or only email id or both but at least one field value is required.

**File Format :**

Please Enter Comma Separated or Excel File with column format : Firstname,Lastname,Mobile No,or Email ID ,Birth Date(dd:MM:yyyy HH:mm:ss),Anniversary(dd:MM:yyyy HH:mm:ss),Start Date(dd:MM:yyyy HH:mm:ss),End Date(dd:MM:yyyy HH:mm:ss),Send Wishes(yes/no),Remarks,Status(active/inactive)

Note: This will check mobile number or email for contacts group wise

☒ Not Allow Duplicate
 ☐ Allow Duplicate
 ☐ Allow Duplicate But Remove Old

Select Group\* ▼

**Choose a file** Sample XLS Sample CSV

**Back** **Import**

**Figure 5-7 Import Contacts**

For duplicate checking, there are three options.

- **Not Allow Duplicate:** It means the system will not allow insertion of mobile number and/or email address existing in a specific group. It will ignore all duplicates in the records.
- **Allow Duplicate:** It means the system will allow the insertion of mobile number and/or email for existing contacts, again.
- **Allow Duplicate but Remove old:** It means the system will allow the duplicate of records and latest value will be saved. The previous record will be removed.

**Select Group** in which user wants to import contacts. [NOTE: You must have created a Group or Groups prior. Check section on Group Configuration]

**Choose a File:** Browse file by clicking on Choose a file button.

NOTE:

It is recommended to first download a desired “Sample file” which can be: XLS, XLSX or CSV, depending on your preference. Then add your data/information on the downloaded sample file, save it somewhere on your computer. Then return to the screen to “Choose a file” – that saved file – and then Import it. This makes the system works better because of consistent formatting.

Click on **Import button**, system will import all excel sheet contacts into phone book in the **selected group**.

## 5.2 Groups

### Purpose

User can add as well as, edit existing group, by using Manage Group option. group can be deleted as well as, Group status can also be changed, by user.

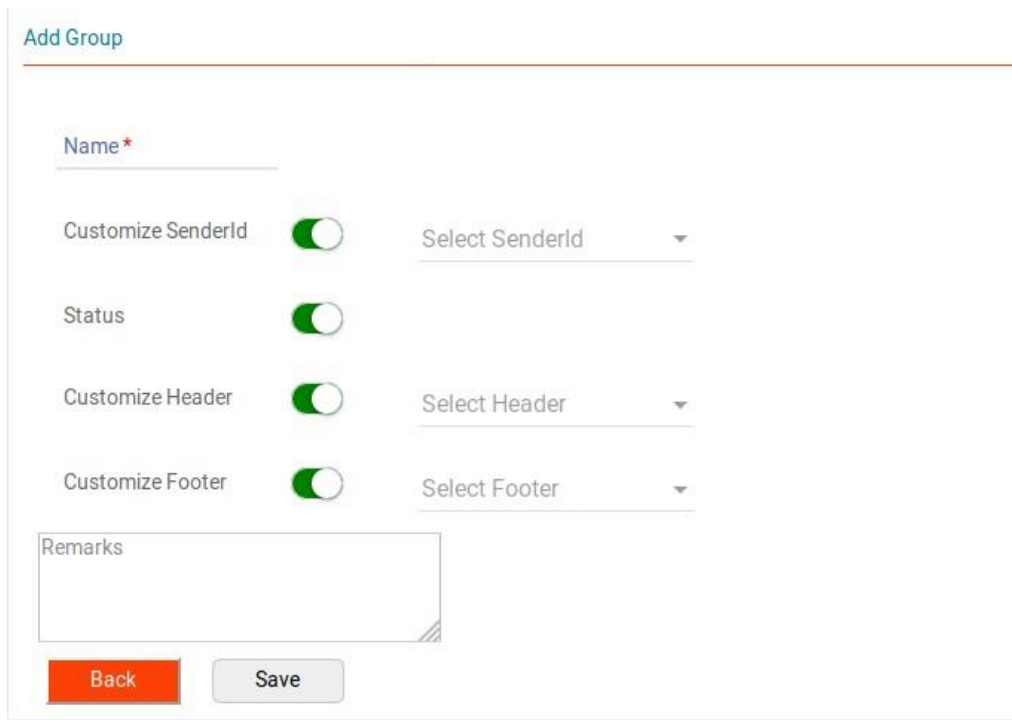
An end user as well as, sub user of an end user can access Manage Group option. Click on **Tools > Groups** link from menu, Figure 5-8 is displayed.



Figure 5-8 Manage Groups

### 5.2.1 Steps to Manage Groups

1. Click on the **bin icon** (Delete) to delete selected groups.
2. Click on the **toggle button** to make group “Active or Inactive”. Green colour means group is active. If parent group is inactive and the sub-groups are made active, in Manage Groups, sub-groups will not be displayed even if the sub-group is made active.
3. Click on **Add button**, Figure 5-9 is displayed.



Add Group

Name \*

Customize SenderId ☒ Select SenderId ▼

Status ☒

Customize Header ☒ Select Header ▼

Customize Footer ☒ Select Footer ▼

Remarks

Back Save

**Figure 5-9 Add Group**

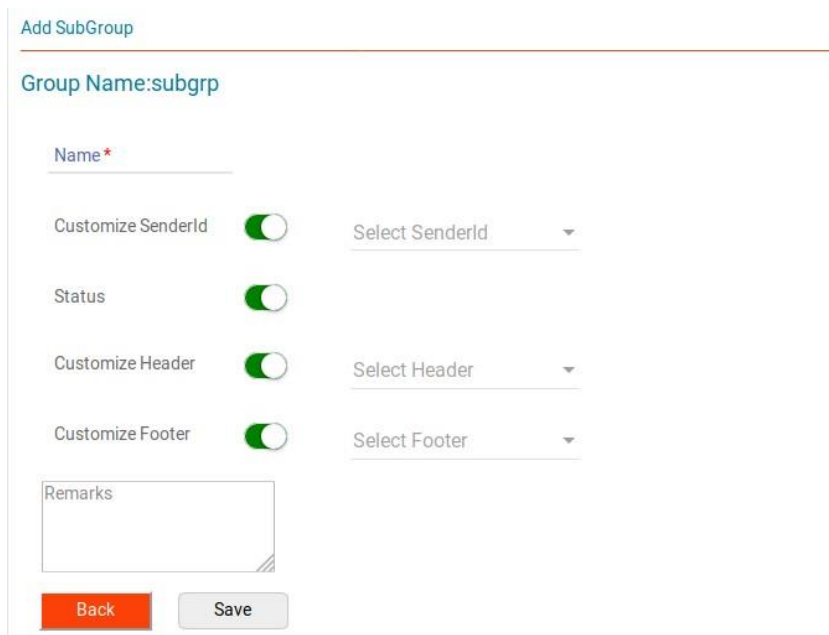
### 5.2.2 Steps to Add Group

1. Enter **Group name**.
2. If user wants to use default SenderID for that group while sending SMS, enable **Customized SenderID** and select from drop down box. Same way for header and footer.
3. Click on **Save button**, to create a group.

### 5.2.3 Steps to Add Subgroup

1. Click on Add Subgroup button. Select a group and Figure 5-10 is displayed.





Add SubGroup

Group Name: subgrp

Name\*

Customize SenderId ☒ Select SenderId ▼

Status ☒

Customize Header ☒ Select Header ▼

Customize Footer ☒ Select Footer ▼

Remarks

Back Save

**Figure 5-10 Add Subgroup**













2. Enter **SubGroup Name**
3. If user wants to use default SenderID for that group while sending SMS, enable **Customized SenderID** and select from drop down box. Same way for header and footer.
4. Click on **Save** button, to create a subgroup under the selected group.

## 5.3 Templates

### Purpose

If format of messages, sent by user, is constant or fixed for everyday message sending, then user can predefine a format for the message(s), by using **Manage Template** option. **Header/Footer** can also be pre-defined, to append/use with a message. Option to select such pre-defined templates, is available in **Send SMS** option. It means to use pre-defined templates in Send SMS, it must first be created here under Tools > Templates.

Click on **Tools > Templates** link from menu and Figure 5-11 is displayed.

Manage Template				
List of Templates				
Sr.No.	Name ↕	Type ↕	Message ↕	Action
1	Good Morning	Message	Hello Dear, Good Morning.	 
2	Footer	Footer	Regards, Maulik	  
3	Header	Header	Header	  
<div>   <span>1</span>   </div> <div>10 ▾</div>				
Total 3 Records Found				
<div>Add</div>				

**Figure 5-11 Manage Templates**

### 5.3.1 Steps to Manage Templates

1. Click on bin icon to “**Delete**”, template from list.
2. Click on toggle button to “**Active/Inactive**”, a template.

**NOTE:**

*Inactive template will not be displayed in **Send SMS** screen*

### 5.3.2 Steps to Add New Template

1. Click on **Add button**. Figure 5-12 is displayed.

Add Template

---

**Note :**  
1) One extra white space will append with template in messages.  
2) \${First\_Name} and \${Last\_Name} variables will apply only for Group SMS.

Select template type\* ▼

Template Name \*

First Name    Last Name

Message\* Characters: 0/550

**Figure 5-12 Add Template**

2. Select **message/header/footer from template type** drop down box, as per user's requirement.
3. Enter **Template Name**
4. Type your message.
5. Click on link of **First name** and **Last name**, to append it in sent message.
6. Click on Save button, to save the template and to use it for sending SMS afterwards.

#### *5.3.2.1 Constraints for Adding Template*

1. Header and Footer, which are defined by default, cannot be deleted.
2. As message/header/footer is going to be appended in message, content allows one less character than default character limit.

## 6 Services

### 6.1 Request SenderID/CLI

#### Purpose


User can see list of **SenderID**, which they make their end customers to recognise who was sending messages to them. When SenderID is requested, the following statuses are possible: *approved/disapproved/pending*.

#### NOTE:

Request for new SenderID **must** be made by user and approved by administrator of the system (IvySMS Admin) before it can be used.

Click on **Services > Request SenderID/CLI** link from menu, Figure 6-1 is displayed.

Sender ID Details



Sender ID List				
Sr.No.	Sender ID	Status	Description	Default
1	teleoss	Approved	Add	<input type="checkbox"/>
2	SMS	Approved	Add	<input type="checkbox"/>

« 1 » 10 ▾

CSV

Total 2 Records Found

Add Import

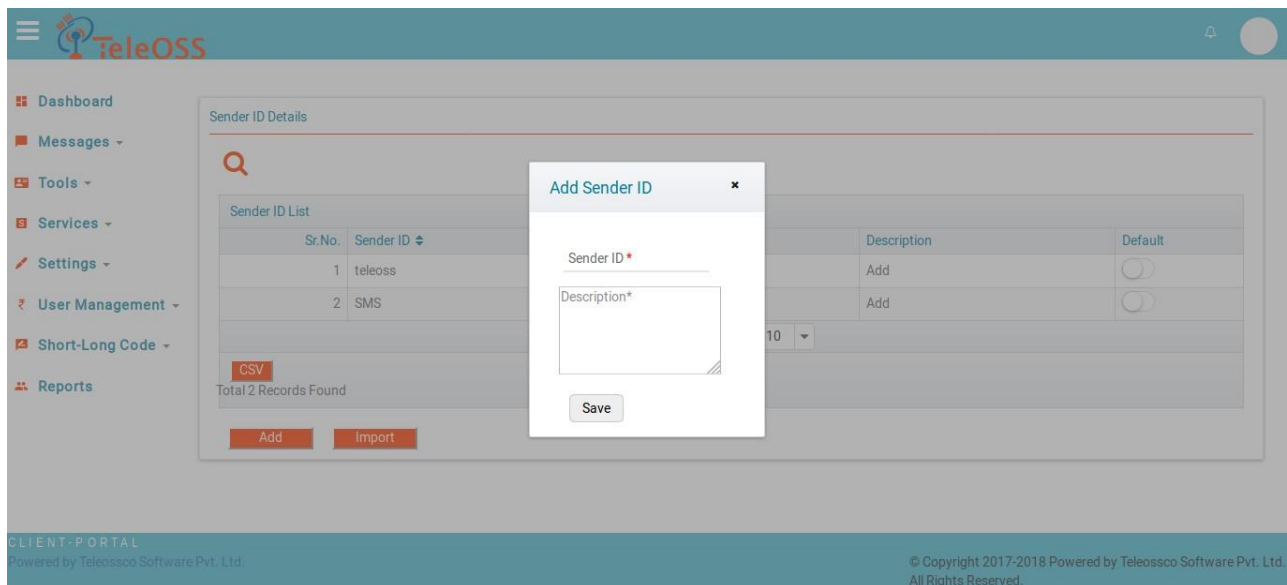
**Figure 6-1 Request SenderID**

If there are more than one SenderID in user's account, click on the toggle button under the column: Default to make the selected SenderID the default. Note that all SenderIDs will be pre-approved by IvySMS admin before they become usable. The default SenderID will be appended to the SMS message in case no SenderID was passed via HTTP API.

#### 6.1.1 Steps to request new SenderID

1. Click on **Add button**. A screen as shown in
2. Figure 6-2 is displayed.
3. **Enter required details (Choice of SenderID)**. SenderID is up to user to decide. E.g. It could be the business name, a product or service name etc. Click **Save button**, to request for SenderID.
4. SenderID should have minimum and maximum length of characters stipulated by the system administrator.

**NOTE:** The SenderID will be approved by IvySMS and will show as **Approved** in the Manage Request SenderID screen. If it is yet to be approved, shown as **Pending** and if disapproved, as **Disapproved**.

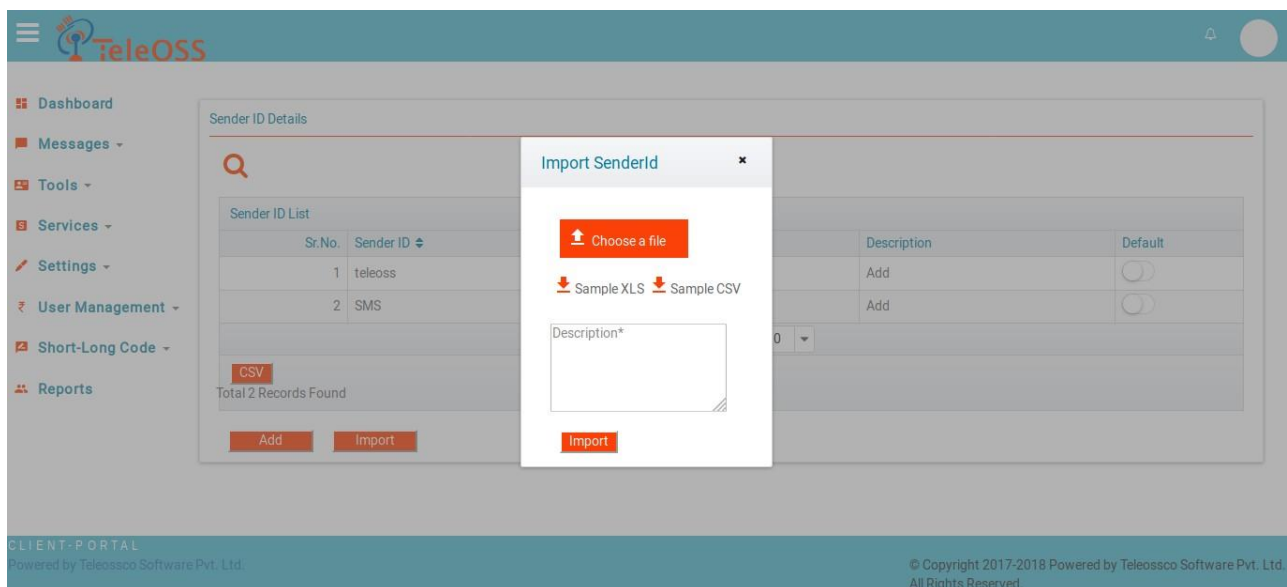


**Figure 6-2 Request SenderID**

### 6.1.2 Steps to Import New Request SenderIDs

This feature is great for users who have different SenderID for different purposes or groups or functions and request can be made for all SenderID required at once instead of requesting individually.

1. Click on **Import button** in Figure 6-1, a screen as shown in
2. Figure 6-3 is displayed.



**Figure 6-3 Import Request SenderID**

3. Click on **Choose a file** button to select file.

*[NOTE: It is recommended to first download a desired "Sample file" which can be: XLS, XLSX or CSV, depending on your preference. Then add your data/information on the downloaded sample file, save it somewhere on your computer. Then return to the screen to "Choose a file"*

- that saved file – and then Import it. This makes the system works better because of consistent formatting].
4. Click on **Import** to request for SenderIDs all at once.

## 7 Settings

### 7.1 API Keys Purpose

Using **API Keys** option, user can restrict an end-user to send SMS from defined IPs unless with a valid API key.



API Key Details

API Key	Name	Allow IP	IP Address	Remarks	Action
*****ea07	CRMKey	yes	192.168.1.1	Add	
*****f76d	Default	no	Default	Default	

Add

Figure 7-1 Manage API Keys

#### 7.1.1 Steps to Manage API Keys

1. Click on **Settings > API Keys** link from menu and Figure 7-1 is displayed. API keys will be in encrypted form for security purpose.
2. To view API key, click on API Key text, it will ask login password for verification. Enter valid login password and click on verify button, it will display readable API keys, as shown in Figure 7-2.
3. Click on bin icon (Delete) under **Action** column if user wants to delete an API key.



API Key Details

API Key	Name	Allow IP	IP Address	Remarks	Action
a7d91d96d07aea07	CRMKey	yes	192.168.1.1	Add	
a9284a2b26b4f76d	Default	no	Default	Default	

Add

Figure 7-2 View API Keys

#### 7.1.2 Steps to Add New API Key

1. Click on **Add button** on **Settings > API Keys**. Figure 7-3 is displayed.
2. Enter a **Name** to uniquely identify your API. This will be needed for identification later.
3. Click on **Generate** link to generate key.
4. If you want to allow specific IPs to be accessed, click on Allow IP toggle button to activate **“Allow IP”** and IP addresses can be entered as required.

5. Click on **Add** button, to create API Key.



**Figure 7-3 Add API Key**

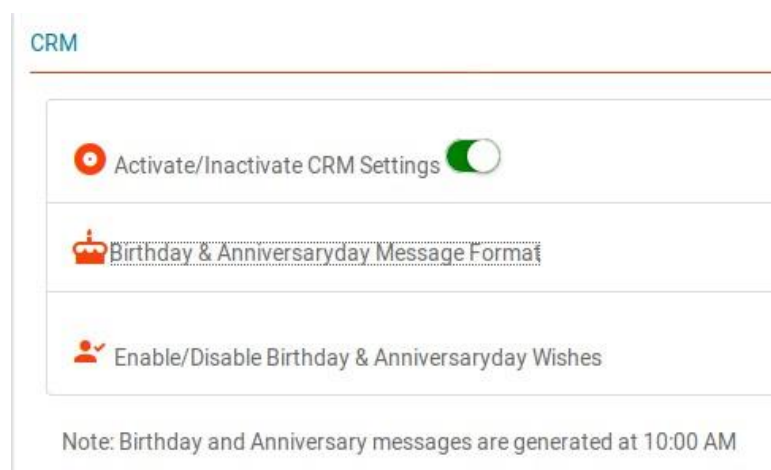
## 7.2 CRM

### Purpose

The **CRM** feature allow users to send birthday and other anniversaries felicitation messages to their own customers (end-users). **CRM Setting** feature can be activated or deactivated. CRM Setting includes pre-formatted messages for different anniversaries: birthdays, wedding anniversary, business anniversaries, milestone celebrations etc. There is option to enable or disable such messages.

#### 7.2.1 Steps to configure CRM settings

1. Click on **Settings > CRM** link from menu and Figure 7-4 is displayed.





**Figure 7-4 CRM Settings**


2. Click on **Activate/Deactivate CRM Setting** using the toggle button. Green colour means user wants to activate CRM Setting. Once it activates it will display note at the bottom of the above Screen: **CRM Settings**.

### 7.2.2 Birthday & Anniversary Message Format

1. **Birthday & Anniversary format**, in Figure 7-5 fields provides options to pre-format birthday and other anniversaries messages separately. The format includes First Name and Last Name. When First Name and Last Name are clicked, First Name and Last Name are automatically included in the outgoing message.
2. Click on **Save** button, after changing content.

CRM

 Activate/Inactivate CRM Settings 

 Birthday & Anniversaryday Message Format

First NameLast Name

Birthday Format\*


Characters : 0 / 999

First NameLast Name

Anniversary Format\*

Characters : 0 / 999

Save

 Enable/Disable Birthday & Anniversaryday Wishes

Note: Birthday and Anniversary messages are generated at 10:00 AM

**Figure 7-5 Birthday and Anniversary Message Format**

### 7.2.3 Enable/Disable Birthday & Anniversary wishes for Groups

User can **enable/disable birthday and anniversary day wishes** option, for specific group. User can select group, from given drop down menu: **All users** or **selected users**. Click on **Enable** button, to enable sending messages to selected user(s) as shown in Figure 7-6.



User Wishes Status

Select Group\*  
All ☒ Disable ☐ Enable

Users List

<input type="checkbox"/>	Sr.No.	Name <input type="text" value="Search"/>	Mobile No	Birth Date <input type="text" value="Search"/>	Anniversary Date <input type="text" value="Search"/>
<input type="checkbox"/>	1	Maulik	+919999999999		
<input type="checkbox"/>	2	Mukesh	+919999999999	30-07-1984	

Total 2 Records Found

**Figure 7-6 Enable Birthday and Anniversary Message**

### 7.2.3.1 Constraints for setting Birthday and Anniversary Messages

1. Messages for Birthday & Anniversary are triggered, at 10:00 AM on applicable days.

## 8 User Management

### 8.1 Company Group

#### Purpose


The main purpose of this is to transfer balance from one account to another account dependent on different user profile as below.



- **Master Admin User:** A master admin can transfer balance from any account to any other account in the same group. S/he can edit company group but cannot make new group.
- **Admin User:** An Admin can transfer balance only from his account to any other account in the same group.
- **Normal User:** A normal user cannot transfer balance.






#### 8.1.1 Steps to Manage Company Groups

1. Click on **User Management > Company Groups** link from menu it will display Company Group as shown in Figure 8-1

Manage Company Group



Manage Company Group				
	Sr.No.	Company Name	Remarks	Action
	1	Teleossco	Add	






10

[CSV](#)


Total 1 Records Found

[Transfer Balance](#)






**Figure 8-1 Company Groups**

- In Figure 8-1, click on the “greater than” sign, it will display the user profile as shown in Figure 8-2. This screen displays users in a group and their role/status in the group.

Manage Company Group

	Sr.No.	Company Name	Remarks	Action
	1	teleossTeam	Internal group	

User Details				
Sr.No.	User ID	User Type	Assign Date	Remarks
1	Arpan	MasterAdmin	04/04/2018 11:59:06	masteradmin
2	dolyST	Normal	04/04/2018 11:59:06	normal
3	Nirbhay	Admin	04/04/2018 11:59:06	Admin






10

**Figure 8-2 User Details**

### 8.1.2 Steps to Edit Company Group




- Click the pencil icon in **Action** column as shown in Figure 8-1. It will display Figure 8-3
- Text fields marked with '\*' are compulsory to fill.
- Modify details and click on “**Update**” button, it will save the modified details.

### Update Company Group

Company Name \*  
teleosTeam

Internal group

Select User \*

User Details				
Sr.No.	User ID	User Type	Remarks	Action
1	Arpan	MasterAdmin	masteradmin	
2	dolyST	Normal	normal	
3	Nirbhay	Admin	Admin	

1 10

Back

Update

Figure 8-3 Edit (Update) Company Group

## 8.2 Transfer Balance

### Purpose

**Transfer Balance** feature is used to transfer balance from one user to another user. "Rate Plan" has an impact on balance transfer because different plans charge differently for messaging.

### Transfer Balance

From User

Amount

To User

Remark

Back

Transfer Balance

Figure 8-4 Transfer Balance

### 8.2.1 Steps to Transfer Balance from User to User

2. Click on **Transfer Balance** button in Figure 8-1 and Figure 8-4 is displayed.
3. Select **From User** and **To User**, from given drop down menu.
4. Enter number of SMS Credit or amount (money), to transfer.
5. Click on **Transfer Balance** button, system will transfer new balance.

## 8.3 Sub-users

### Purpose

An administrator provides access rights and recharge to end users for doing different tasks, with the help of IvySMS gateway backend. These end users can generate their sub users, by using User Management option. Main End User of an application can provide recharge, to his sub users, from his account itself. Such sub-users are provided with less options to operate.

The screenshot shows the 'Manage Subuser' interface. At the top, there is a search bar with a magnifying glass icon, a 'Select User' dropdown, and a 'Search' button. Below this is a table titled 'List of Users'. The table has four columns: 'Sr.No.', 'User ID', 'First Name', and 'Action'. There is one row with the following data: '1', 'test123', 'test', and an 'Action' column containing a green toggle switch and an edit icon. Below the table, there is a pagination bar showing '1' of 10 records. At the bottom, there is an 'Add' button.

Sr.No.	User ID	First Name	Action
1	test123	test	<input checked="" type="checkbox"/>

Figure 8-5 Manage Sub-Users

#### 8.3.1 Steps to manage sub-users

1. Click on **User Management > Subusers** link from menu and Figure 8-5 is displayed.
2. Click on the toggle button in **Action** column to activate or deactivate user. (Green = Activate).

#### 8.3.2 Steps to Add Sub-user

1. Click on “Add” button, Figure 8-6 is displayed.
2. Enter required details in user details tab fields.

The screenshot shows the 'Add Subuser' interface. It has a tabbed layout with two tabs: 'User Details' (active) and 'Personal Details'. The 'User Details' tab contains four input fields: 'User id', 'Password', 'Confirm Password', and 'Password Hint', each with a red asterisk indicating it is required. At the bottom, there are 'Back' and 'Add' buttons.

Figure 8-6 Add sub-user – User Details

3. Click on Personal Details tab, Figure 8-7 is displayed.
4. Enter required details and click on Add button, to save new sub user’s entry.

## Add Subuser

► User Details

▼ Personal Details

First Name *	Last Name *	Mobile No. *	Email id *
Telephone No.	Facebook Id	Skype Id	Linkedin Id
Twitter Id	Birth Date :	Birth Date	Anniversary Date :
			Anniversary Date

Back

Add

**Figure 8-7 Add sub-user – Personal Details**