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.

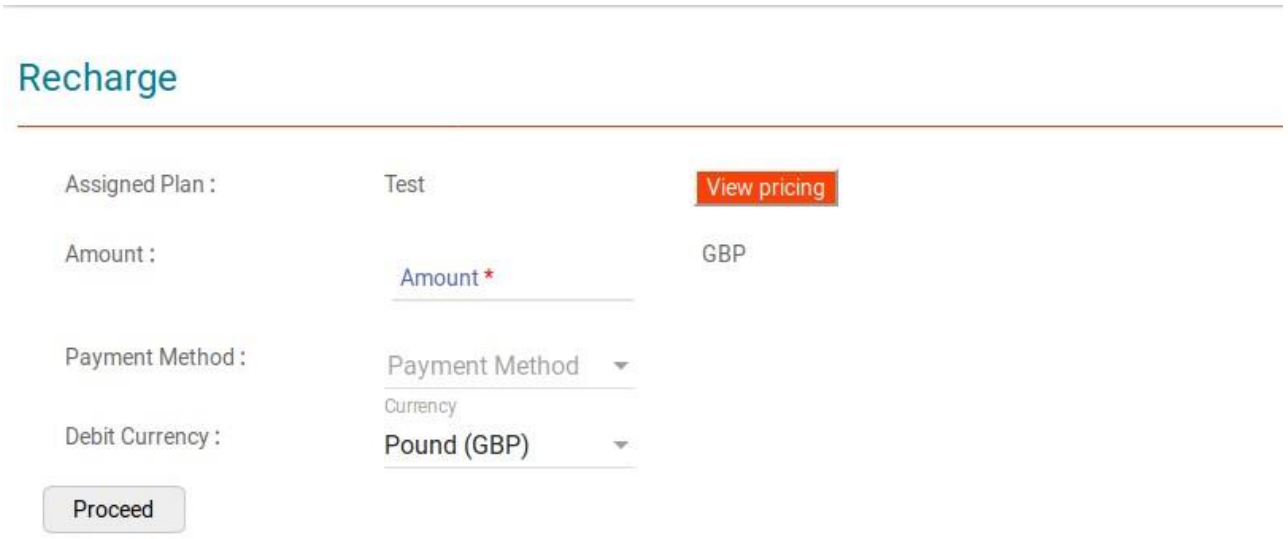

Figure 2-1 Recharge – Step1

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 /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 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

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 .*

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.

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.

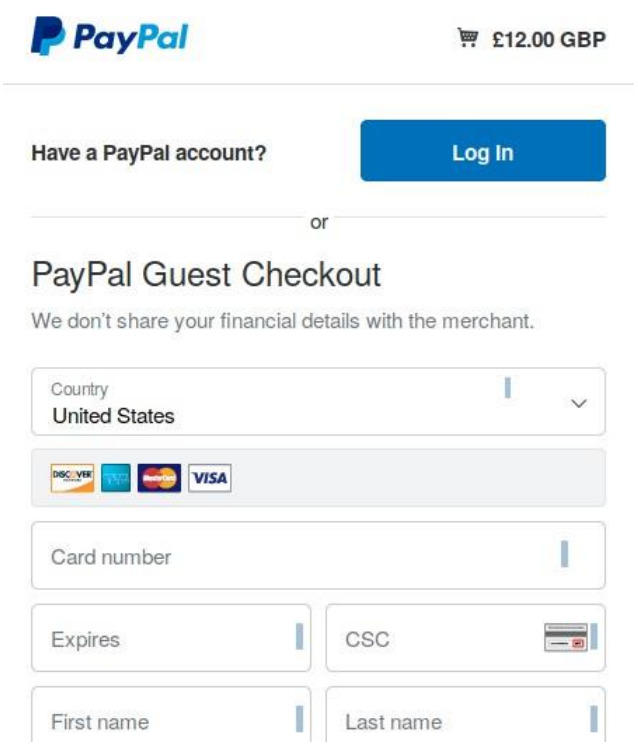

Figure 2-3 Recharge – Step3

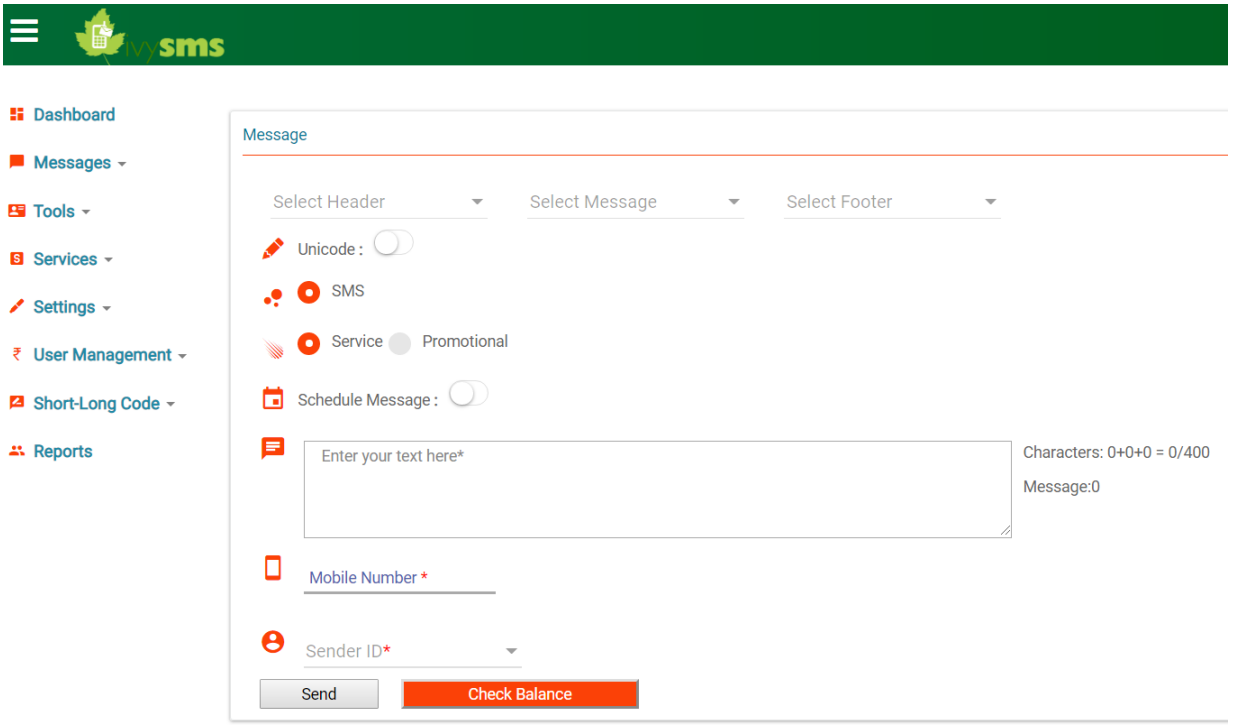

Figure 2-4 Message

3 Dashboard

Purpose

The dashboard enables users to see their detailed account information.

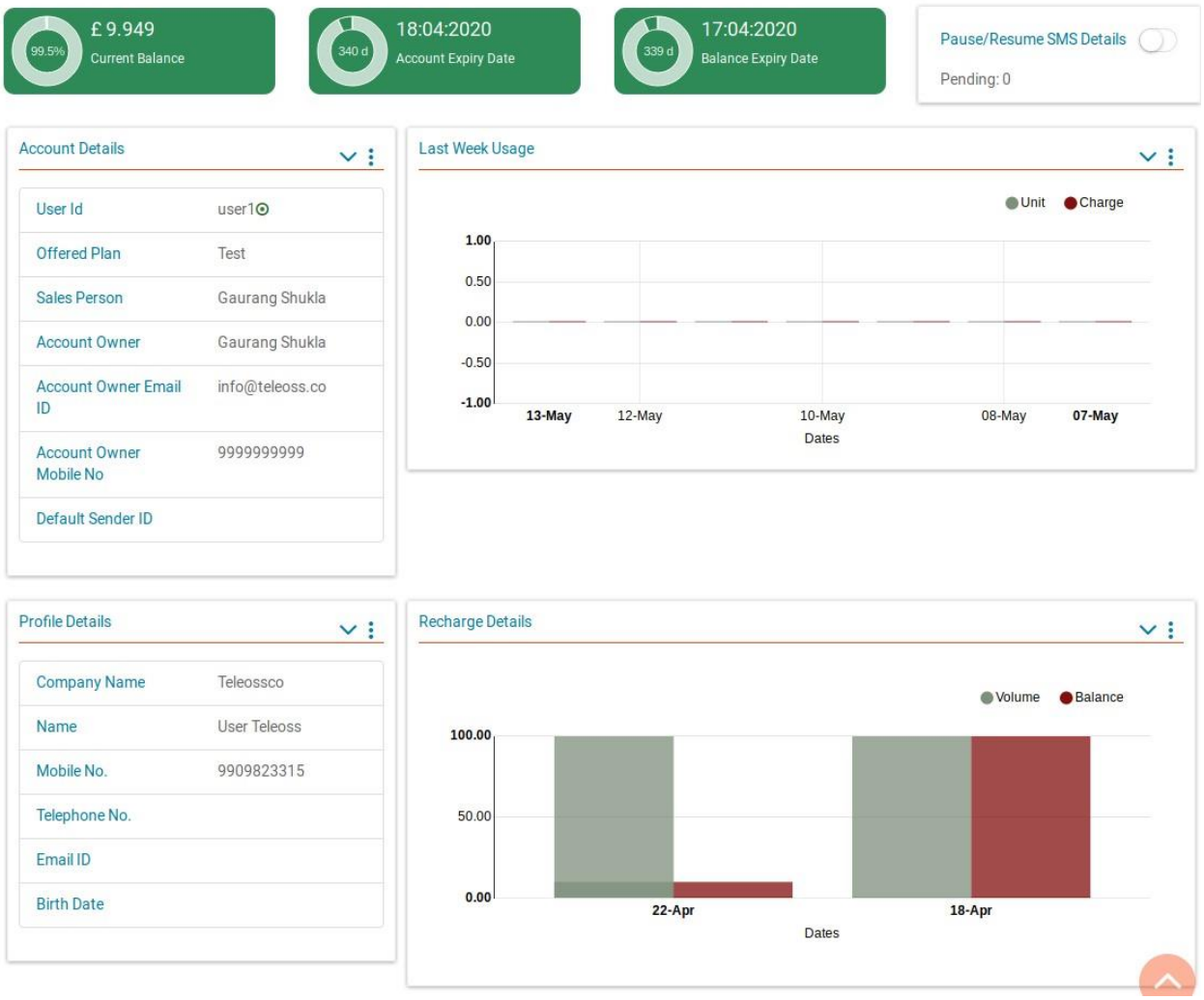

Figure 3-1 Dashboard

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).

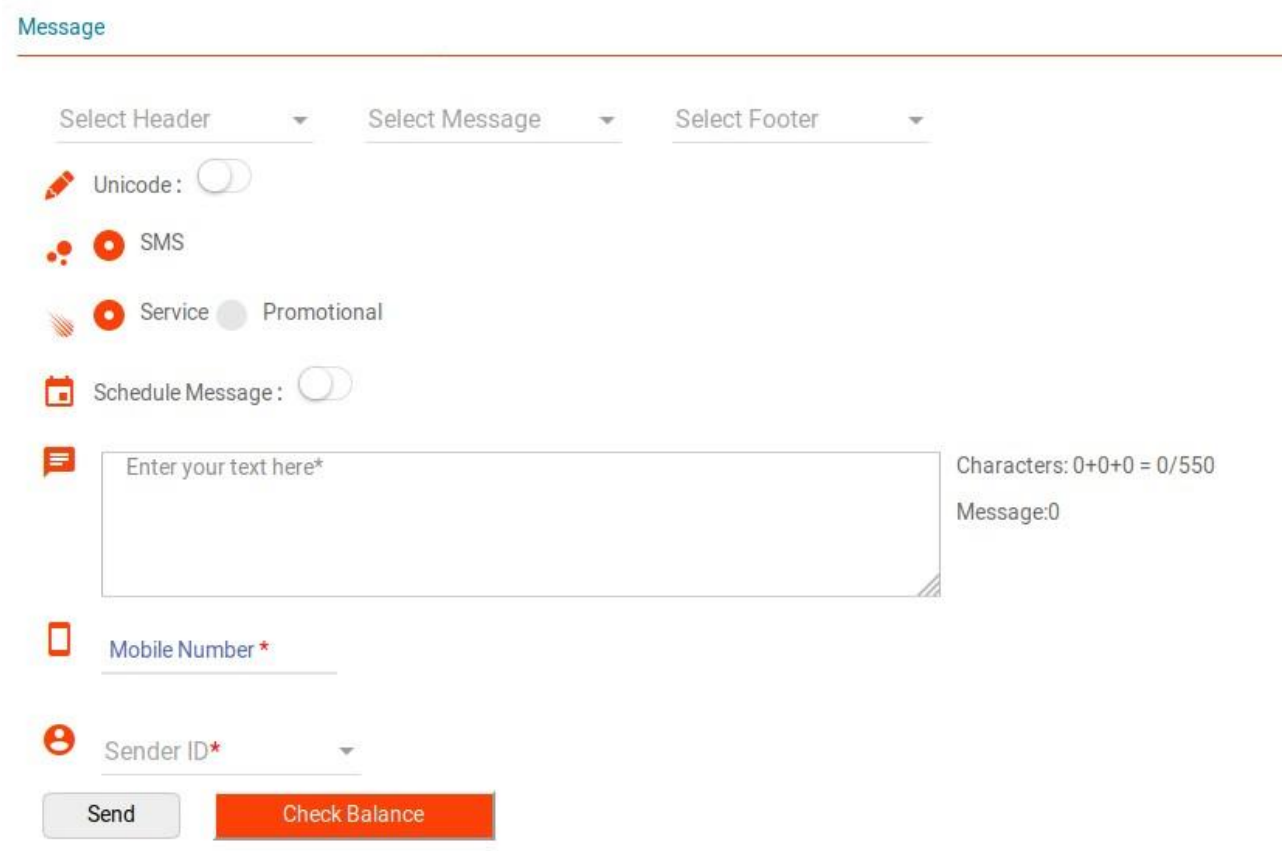

Figure 4-1 Single Message

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

4.1.1 Steps to use Single Message

1. 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).

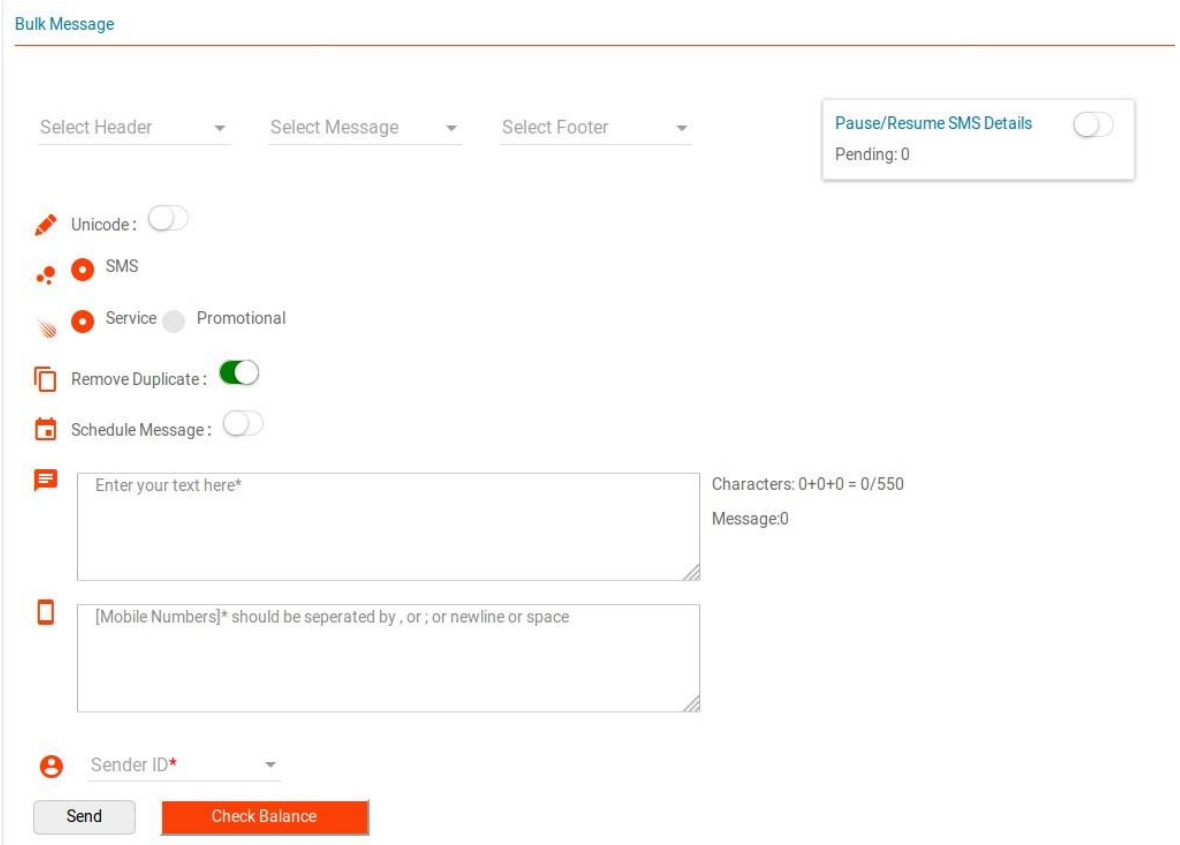

Figure 4-2 Bulk Message

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.

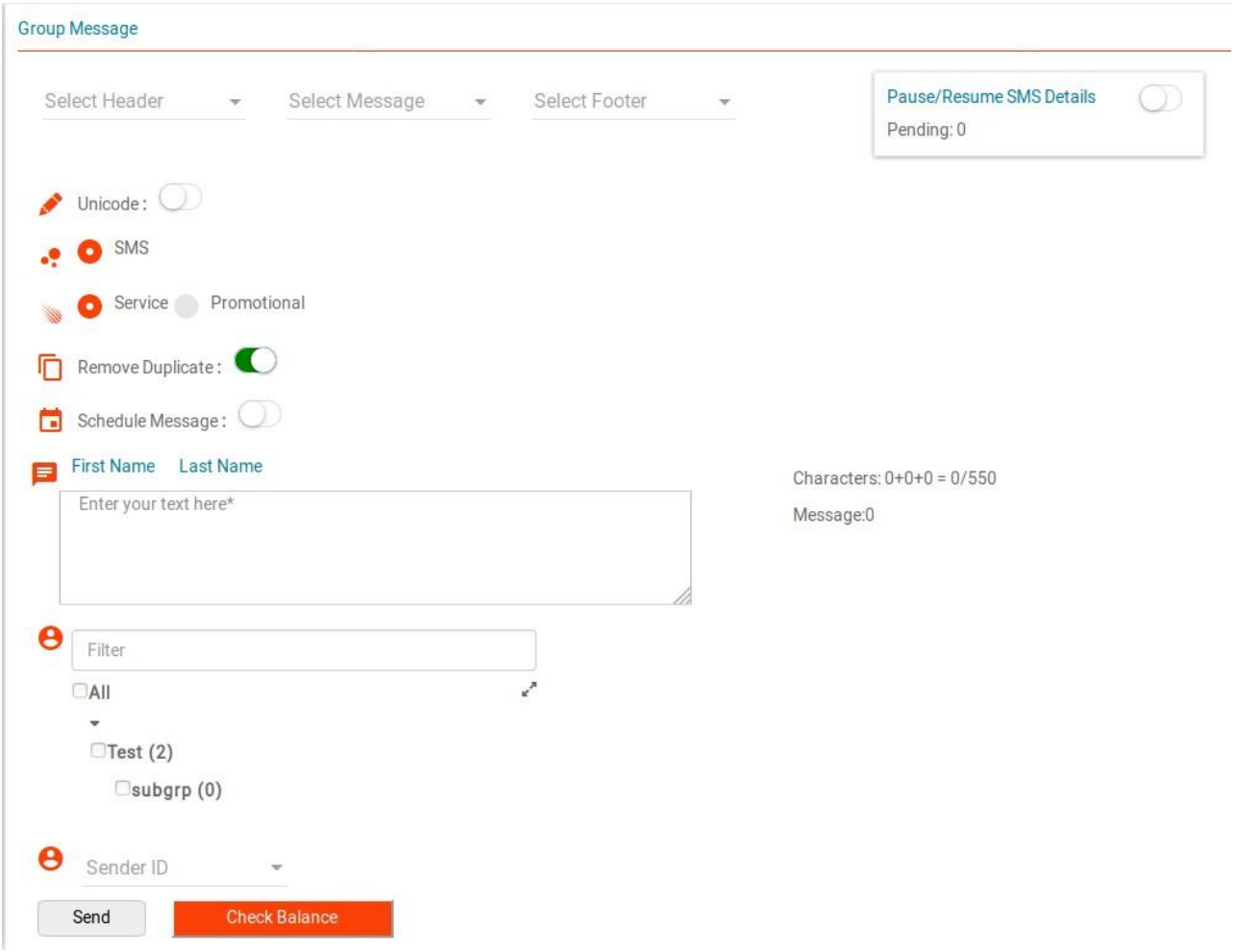

Figure 4-3 Group Message

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.

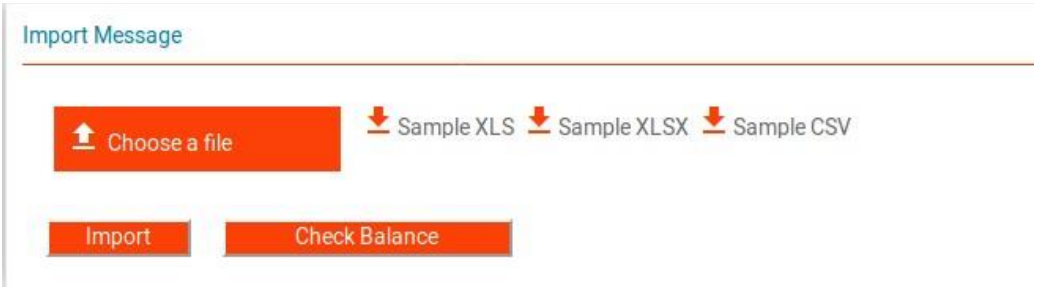

Figure 4-4 Import Message

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 99999999999 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!

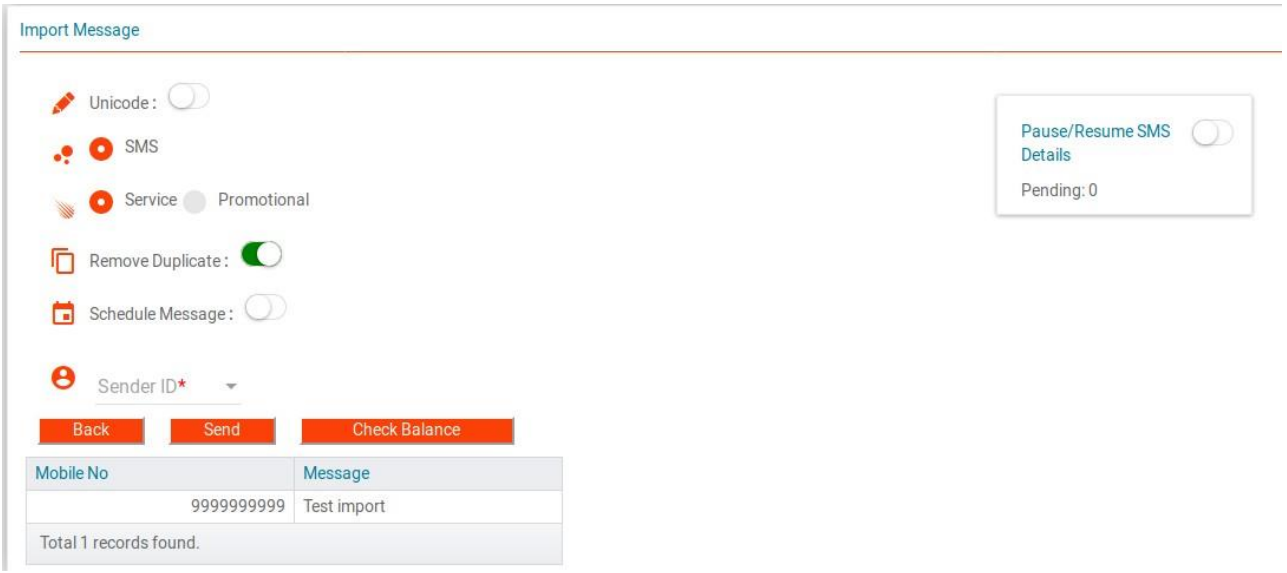

Figure 4-5 Click Import Button

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.

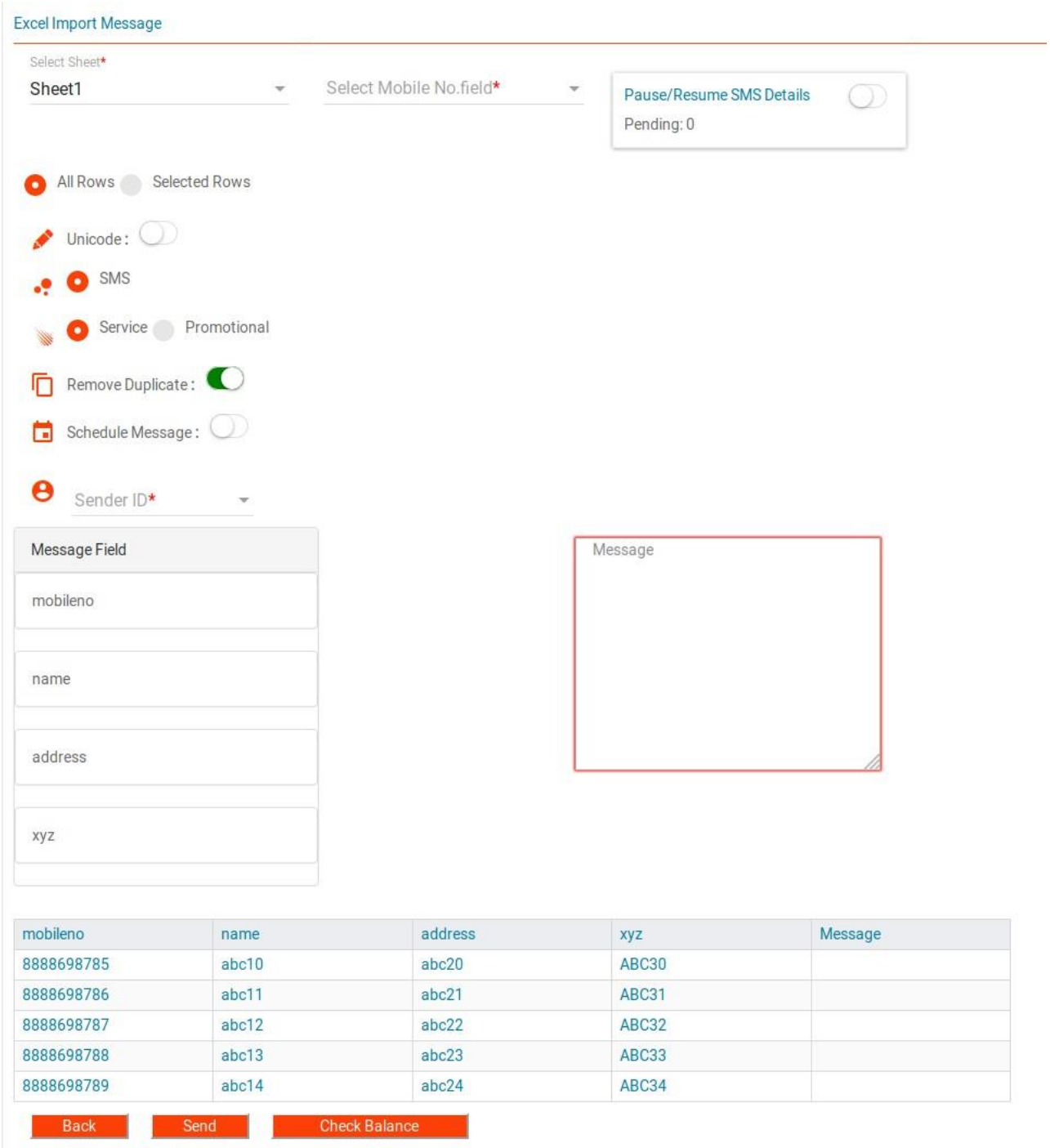

Figure 4-7 Import

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.

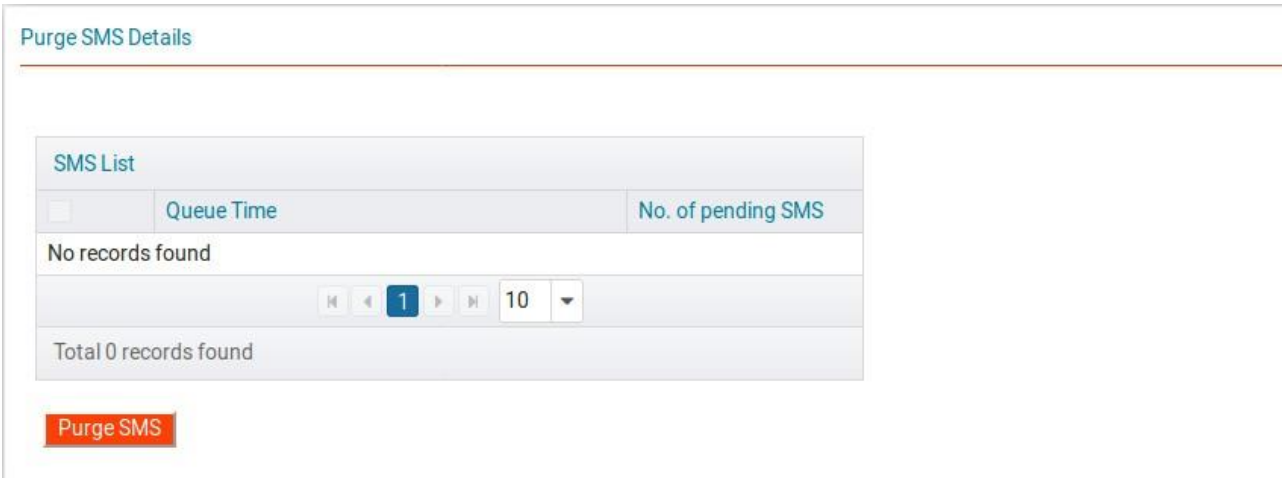

Figure 4-8 Purge SMS

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.

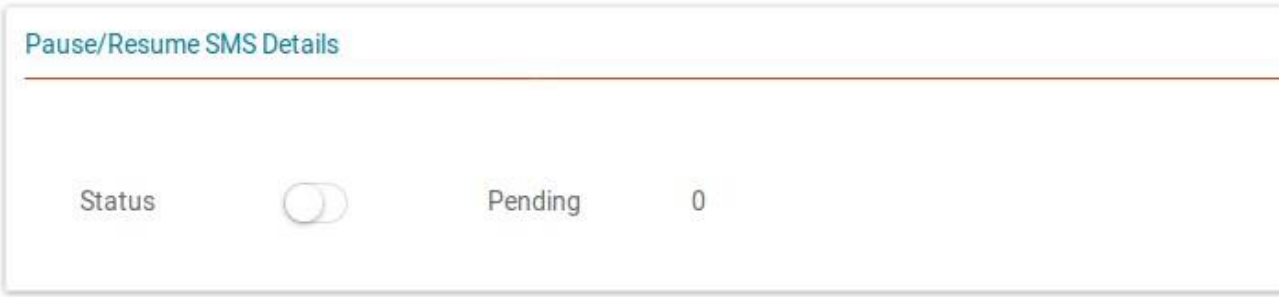

Figure 4-9 Pause/Resume SMS

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

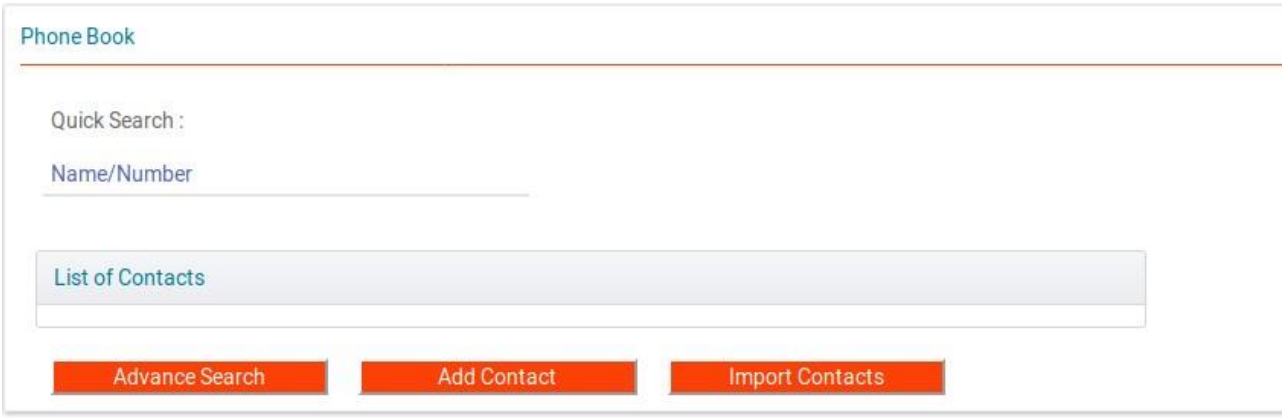

Figure 5-1 Phone Book

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

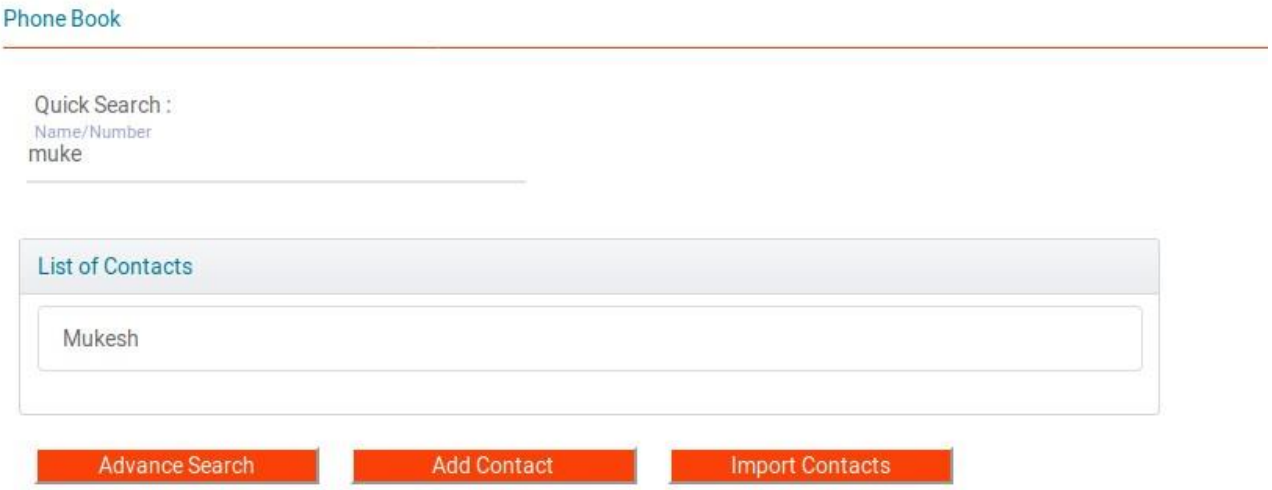

Figure 5-2 Quick Search Result

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

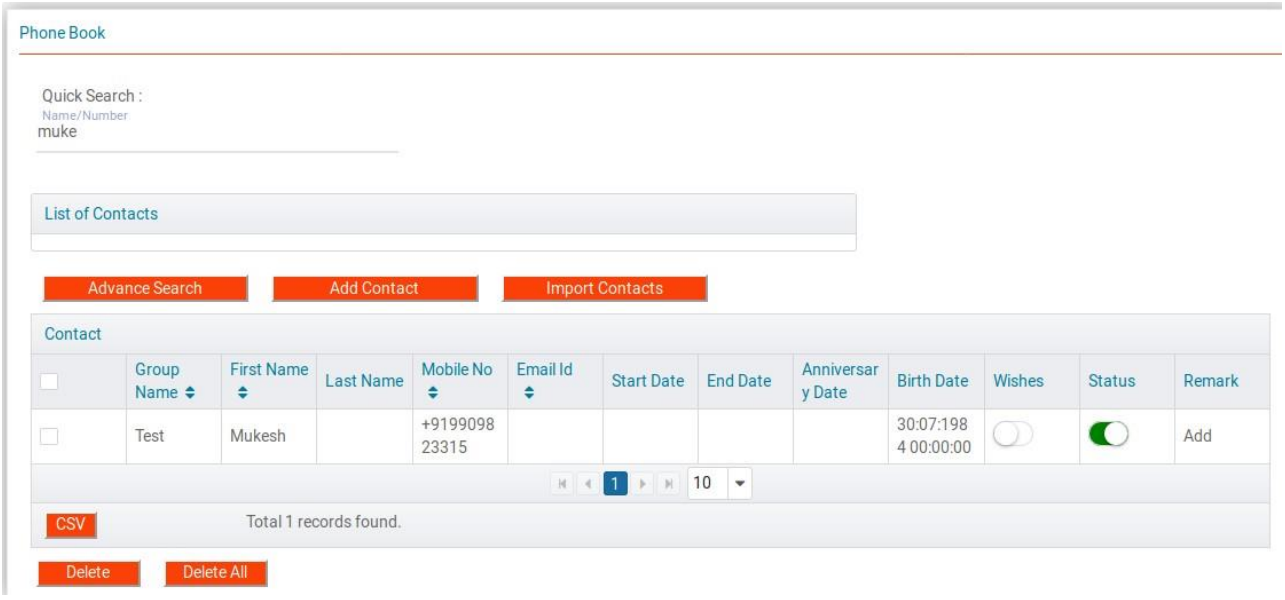

Figure 5-3 Contact Details

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.

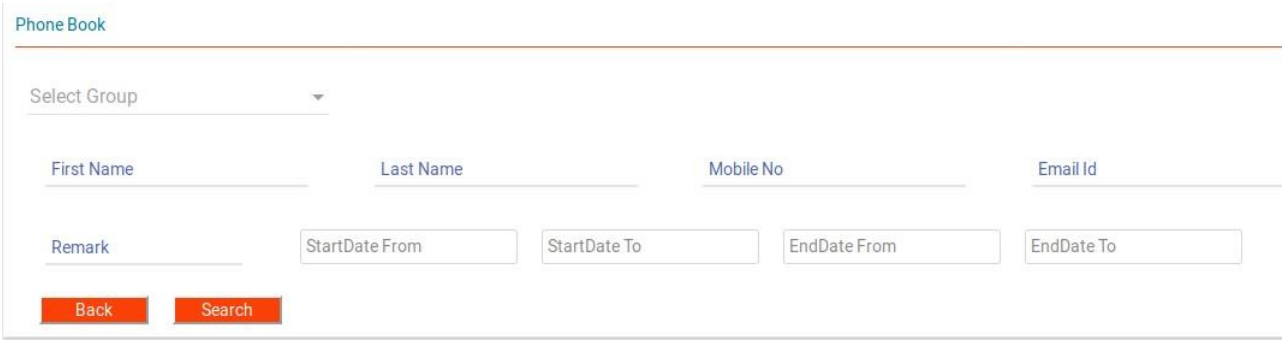

Figure 5-4 Advance Search

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.

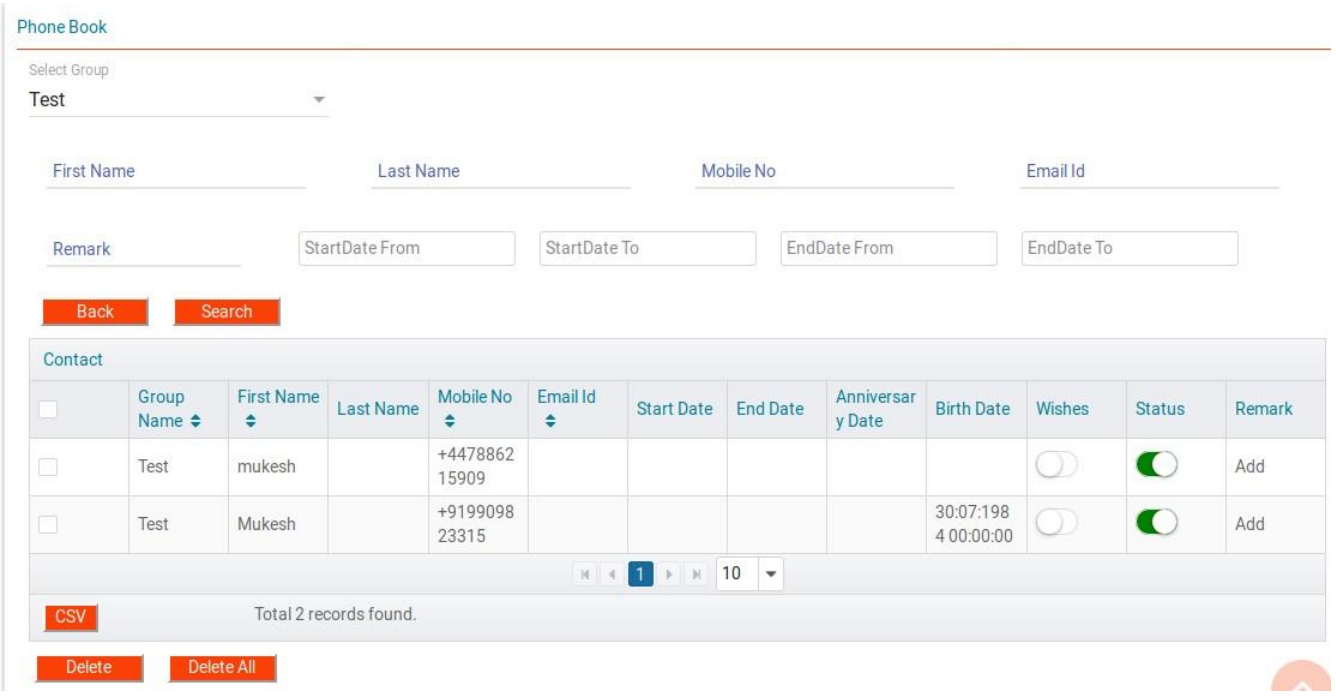

Figure 5-5 Advance Search Result

5.1.1 Add Contact

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

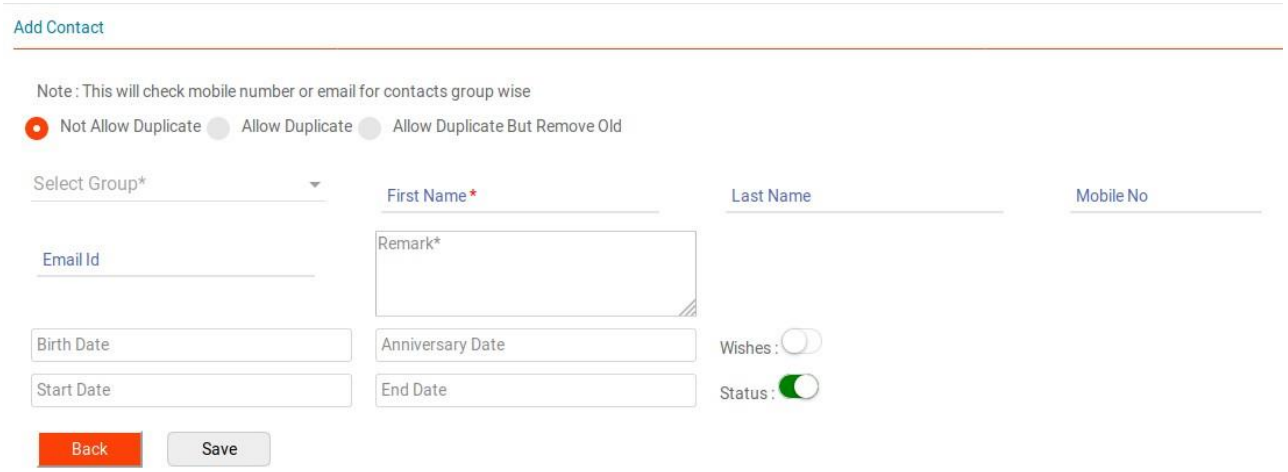

Figure 5-6 Add Contact

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.

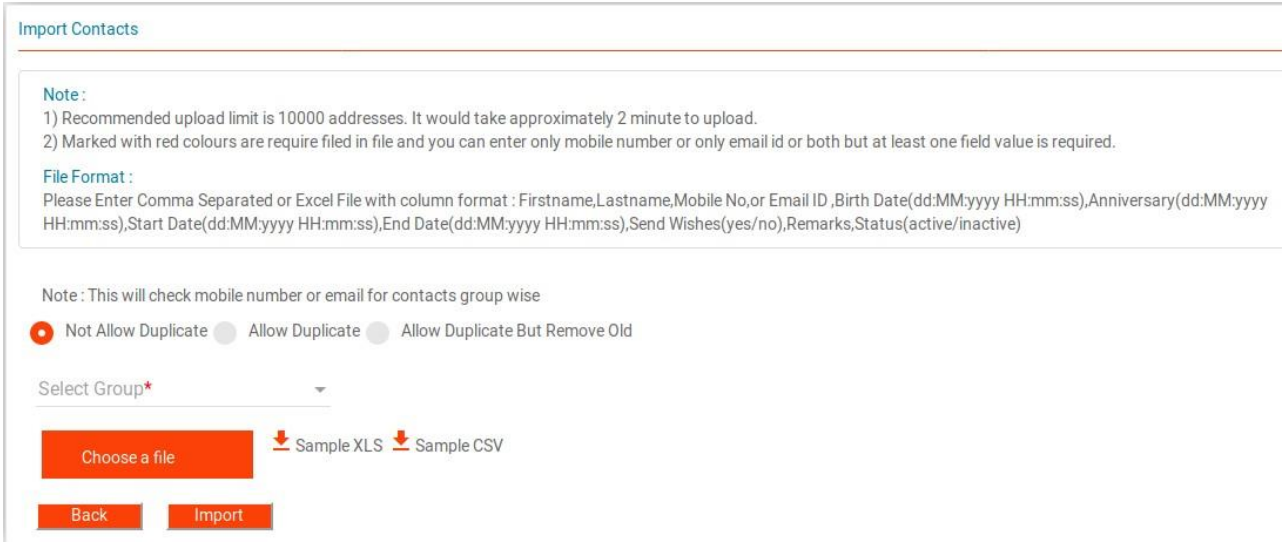

Figure 5-7 Import Contacts

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.

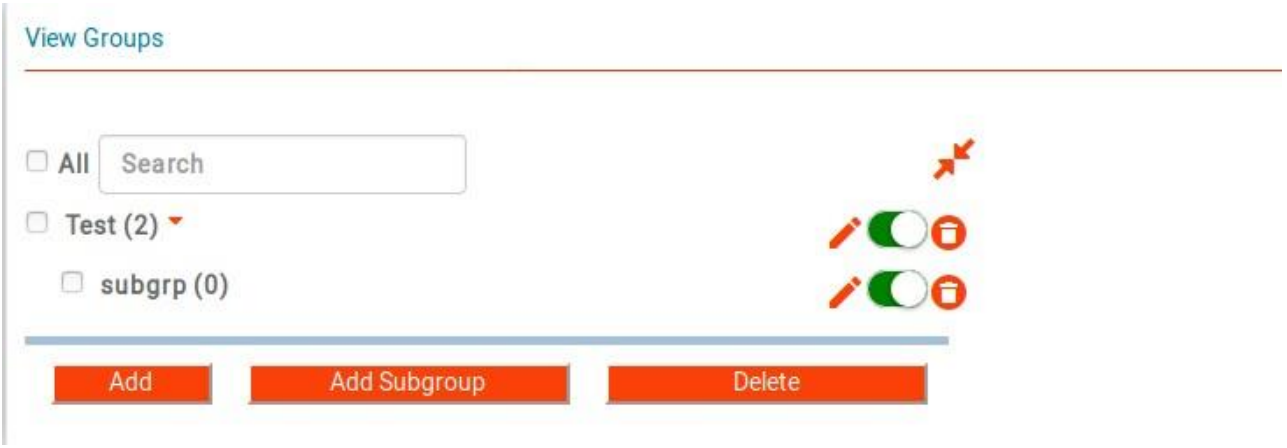

Figure 5-8 Manage Groups

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.

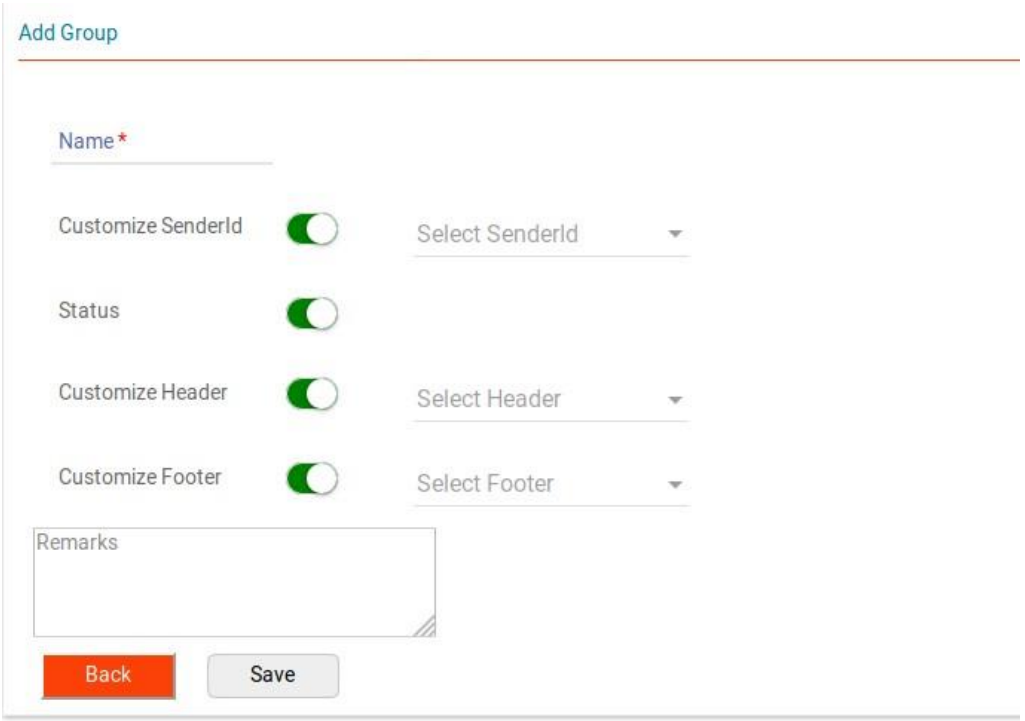

Figure 5-9 Add Group

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.

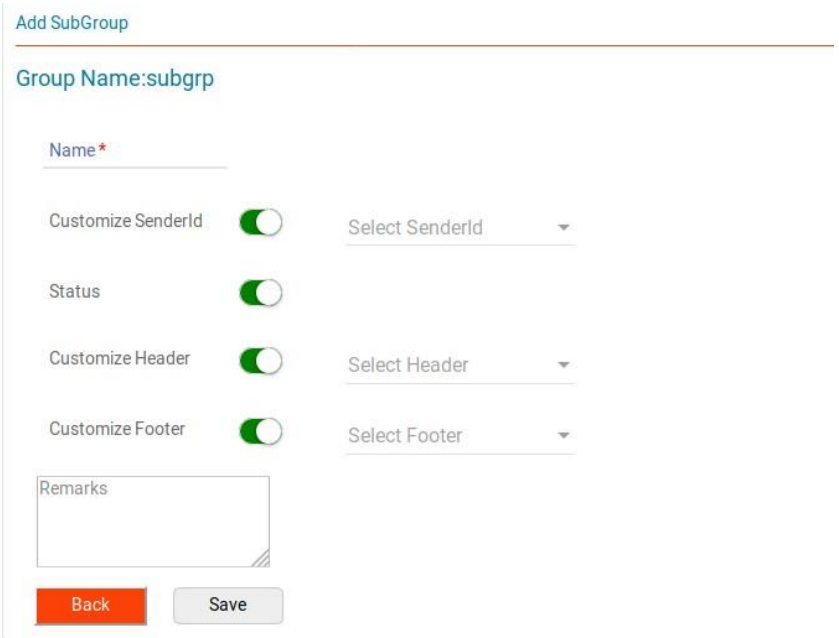

Figure 5-10 Add Subgroup

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.

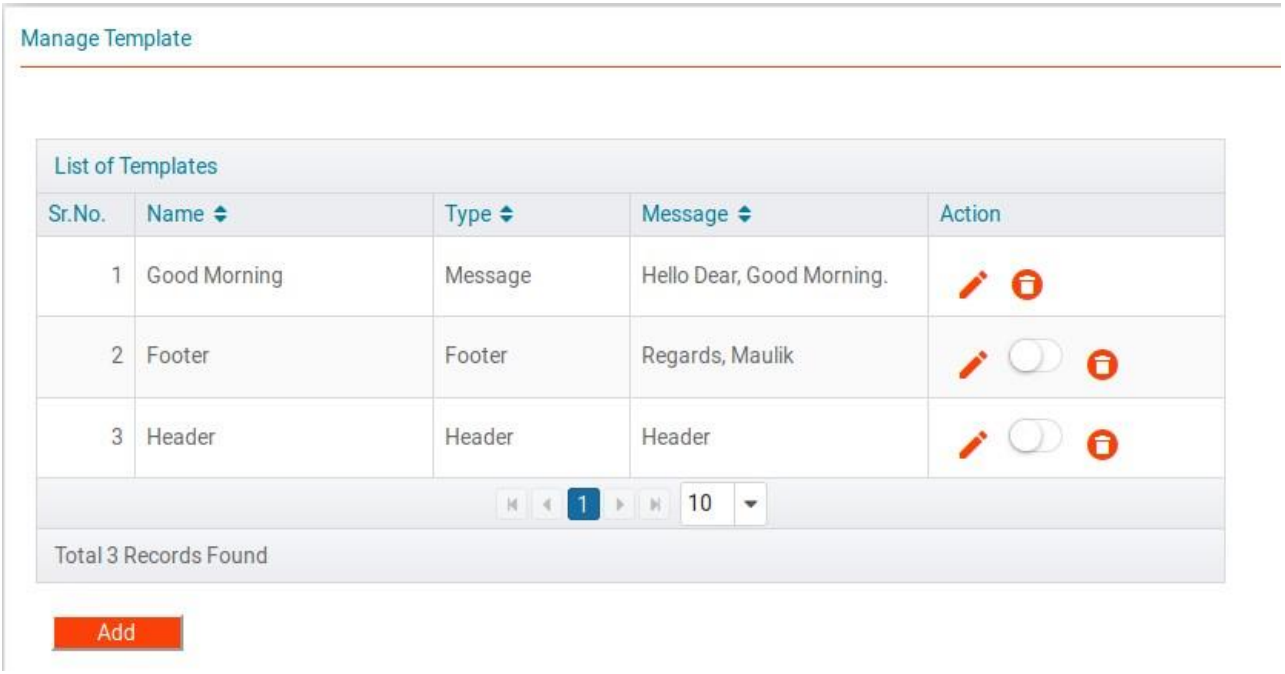

Figure 5-11 Manage Templates

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.

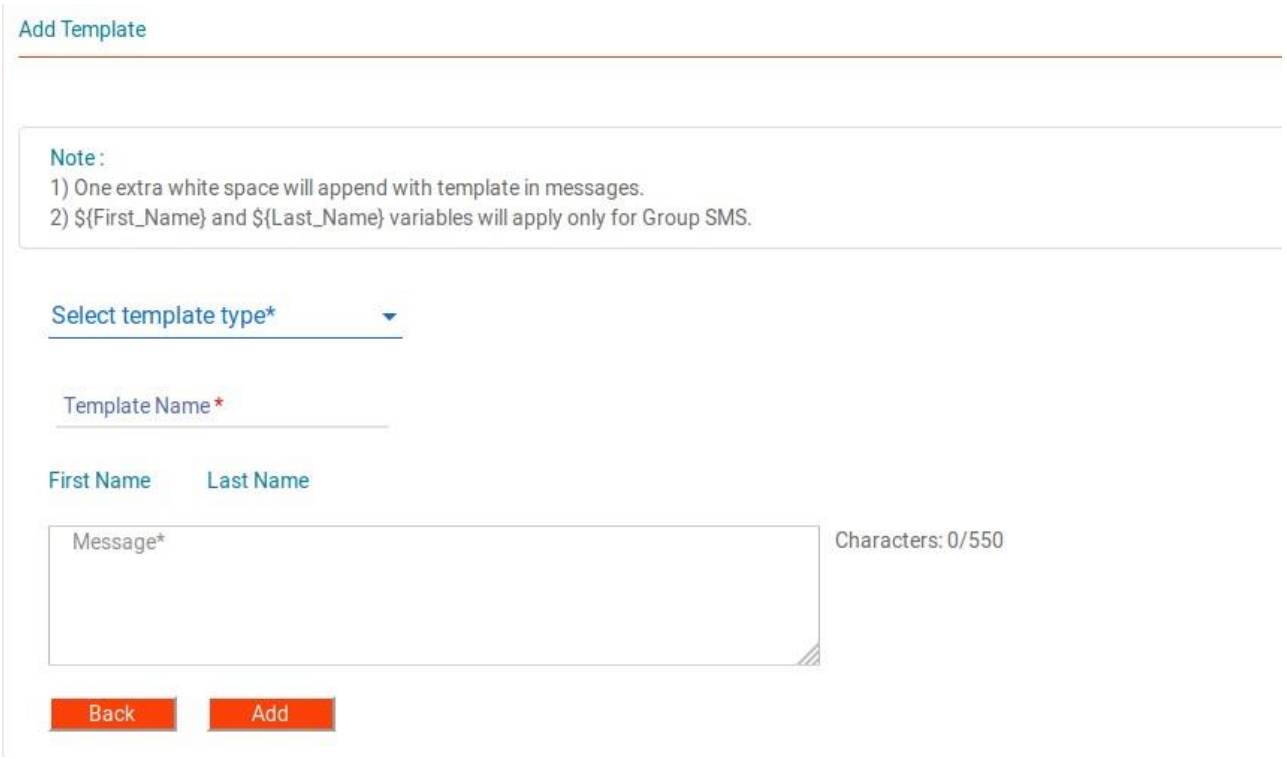

Figure 5-12 Add Template

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 statues 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.

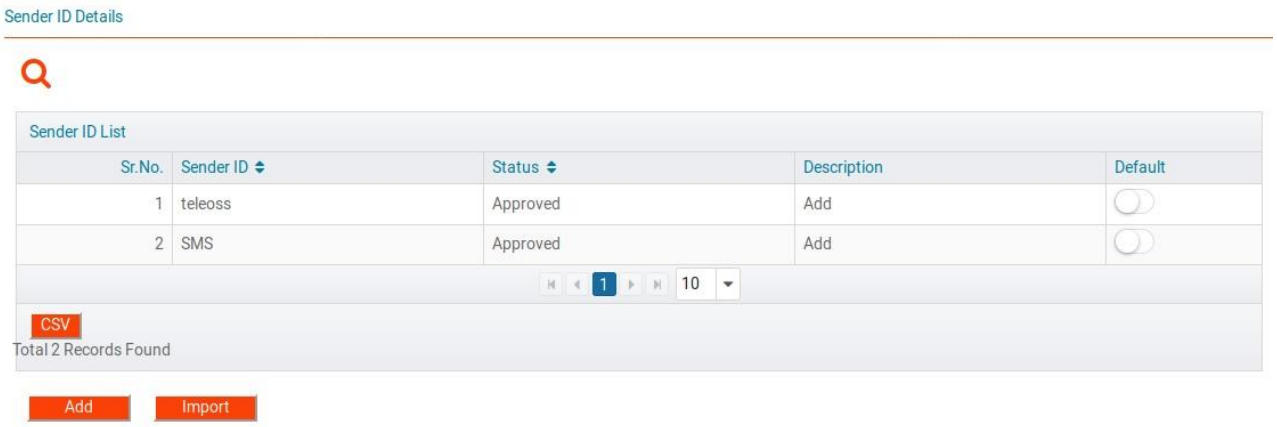

Figure 6-1 Request SenderID

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.***

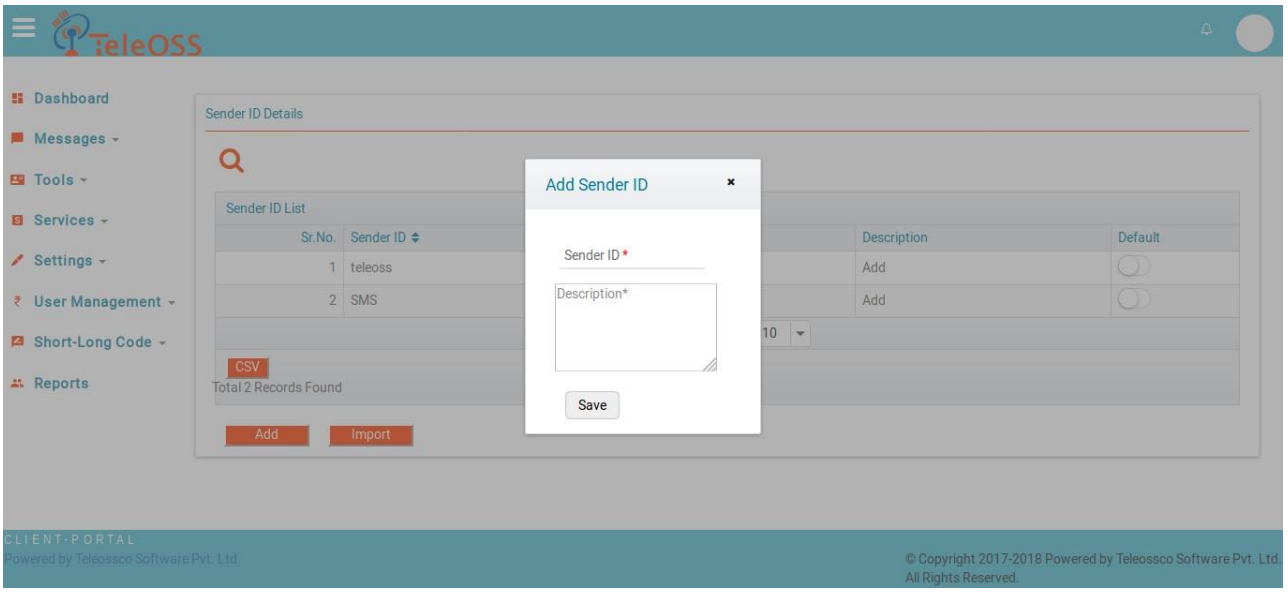

Figure 6-2 Request SenderID

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.

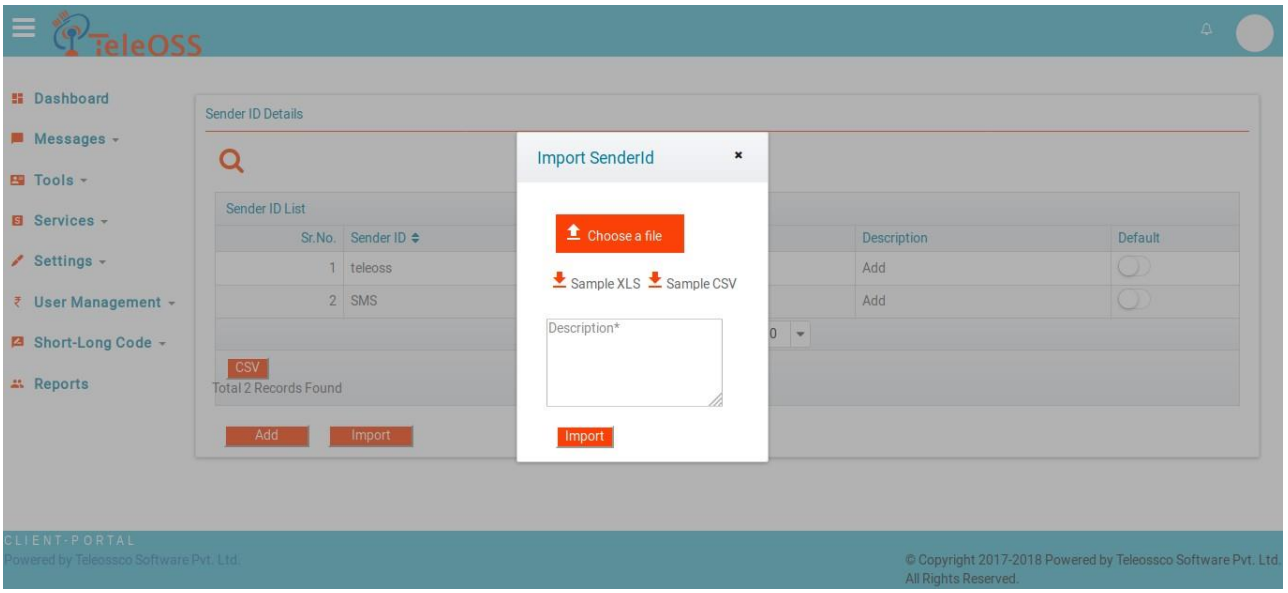

Figure 6-3 Import Request SenderID

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.

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.

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.

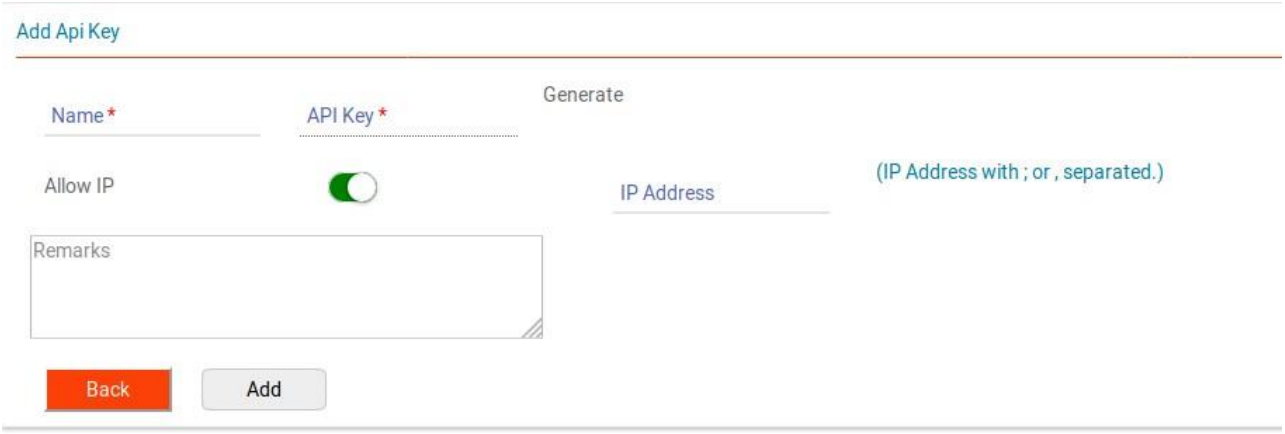

Figure 7-3 Add API Key

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.

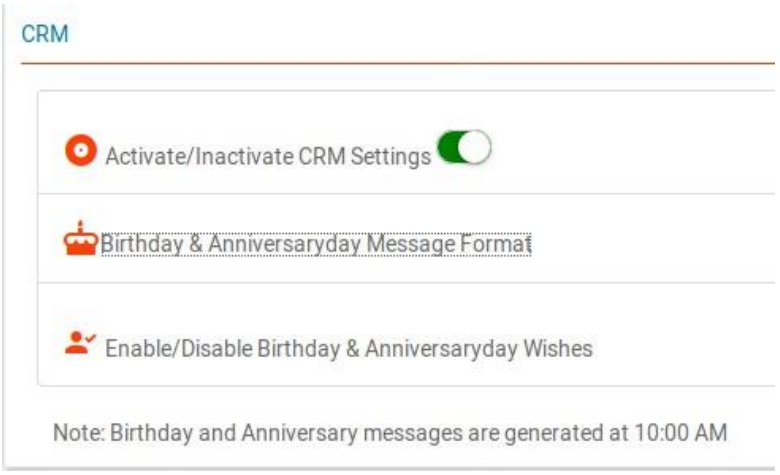

Figure 7-4 CRM Settings

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.

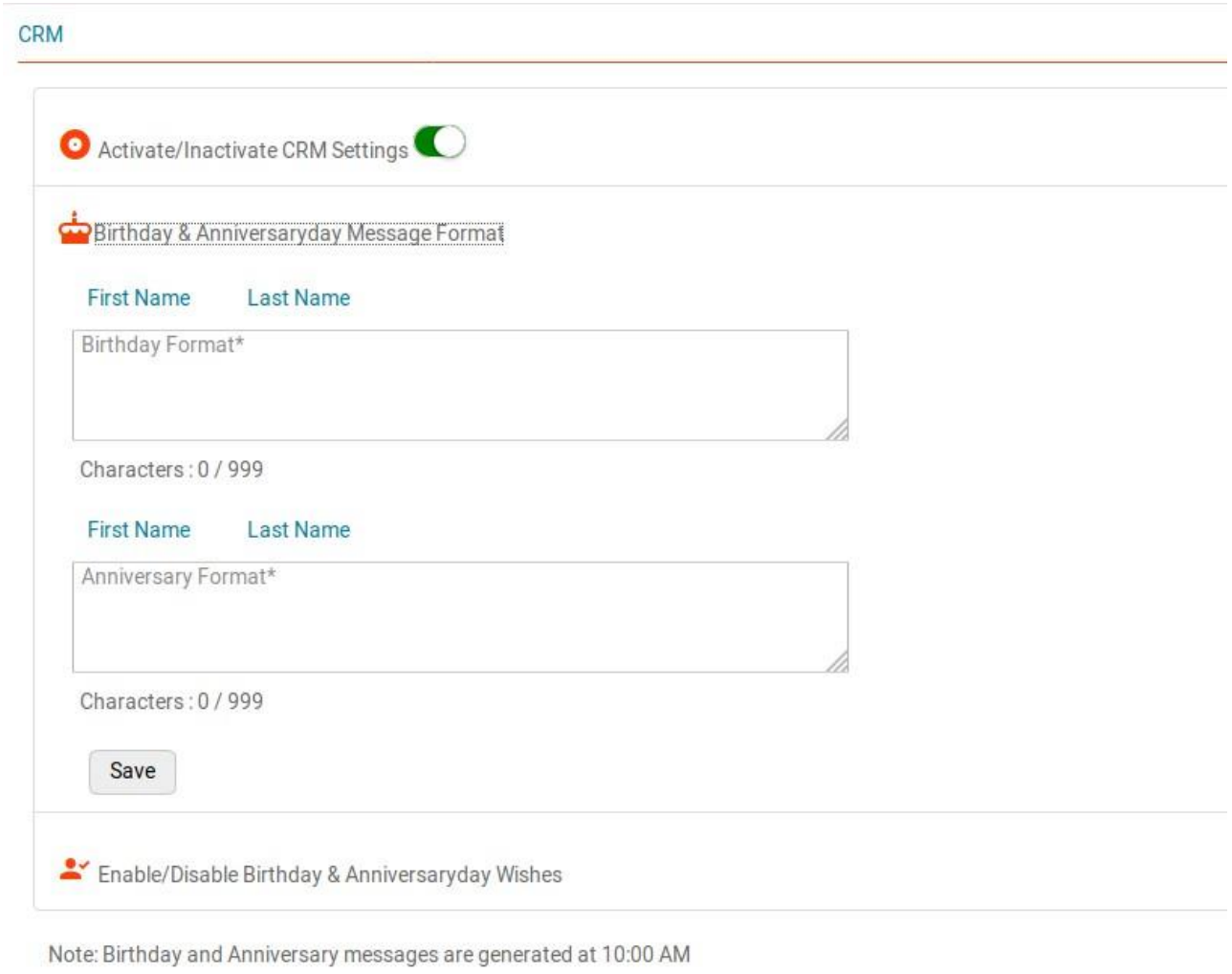

Figure 7-5 Birthday and Anniversary Message Format

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.

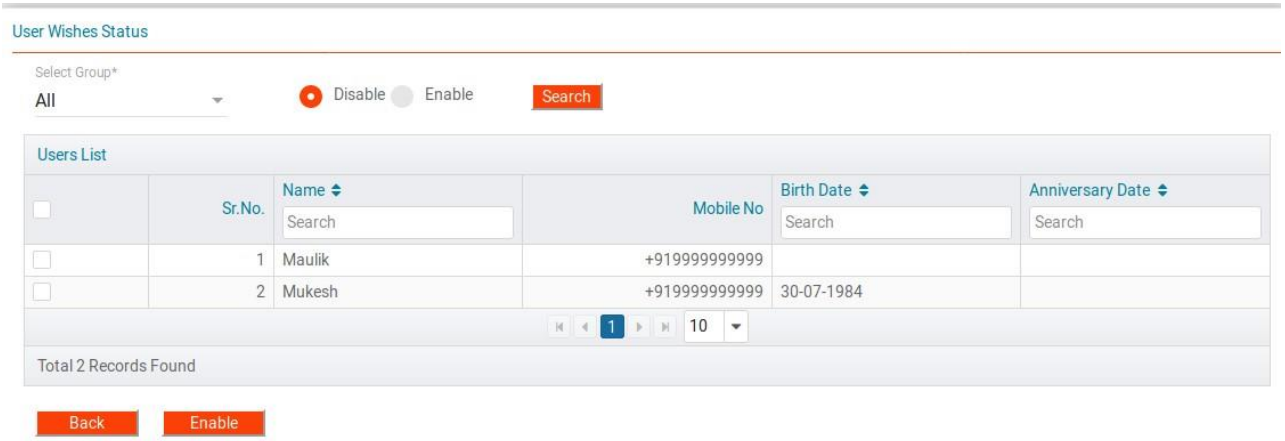

Figure 7-6 Enable Birthday and Anniversary Message

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

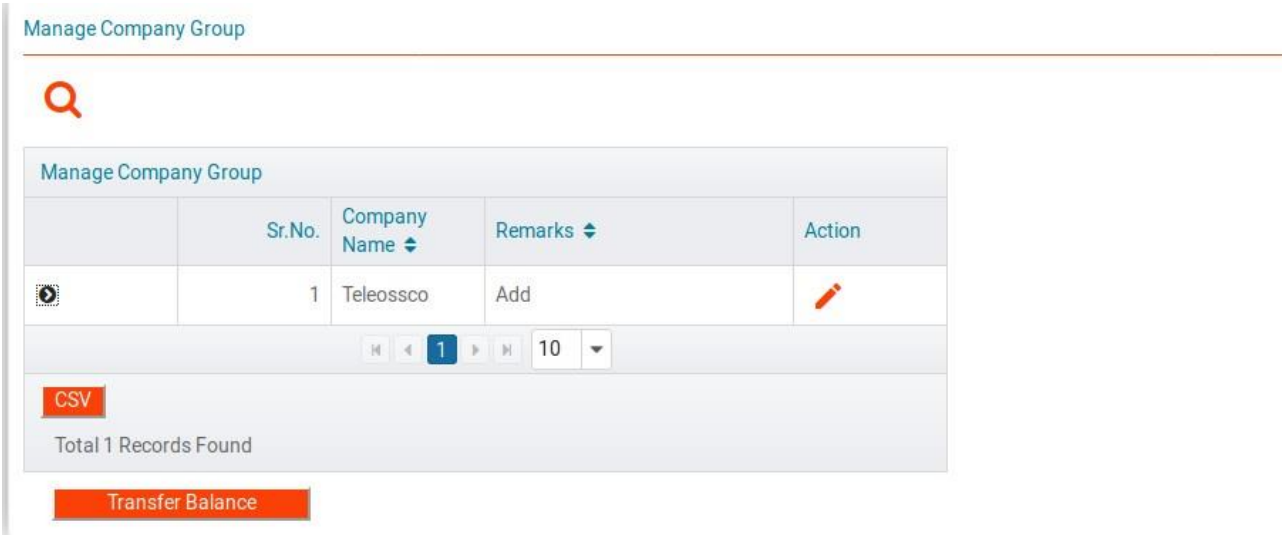

Figure 8-1 Company Groups

2. 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.

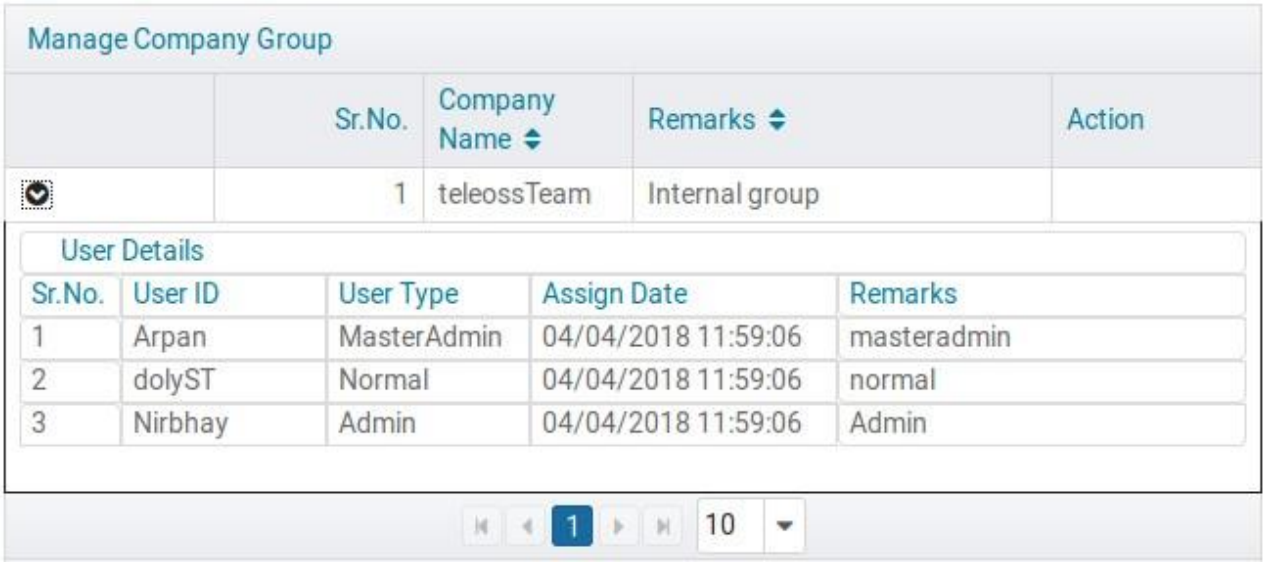

Figure 8-2 User Details

8.1.2 Steps to Edit Company Group

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

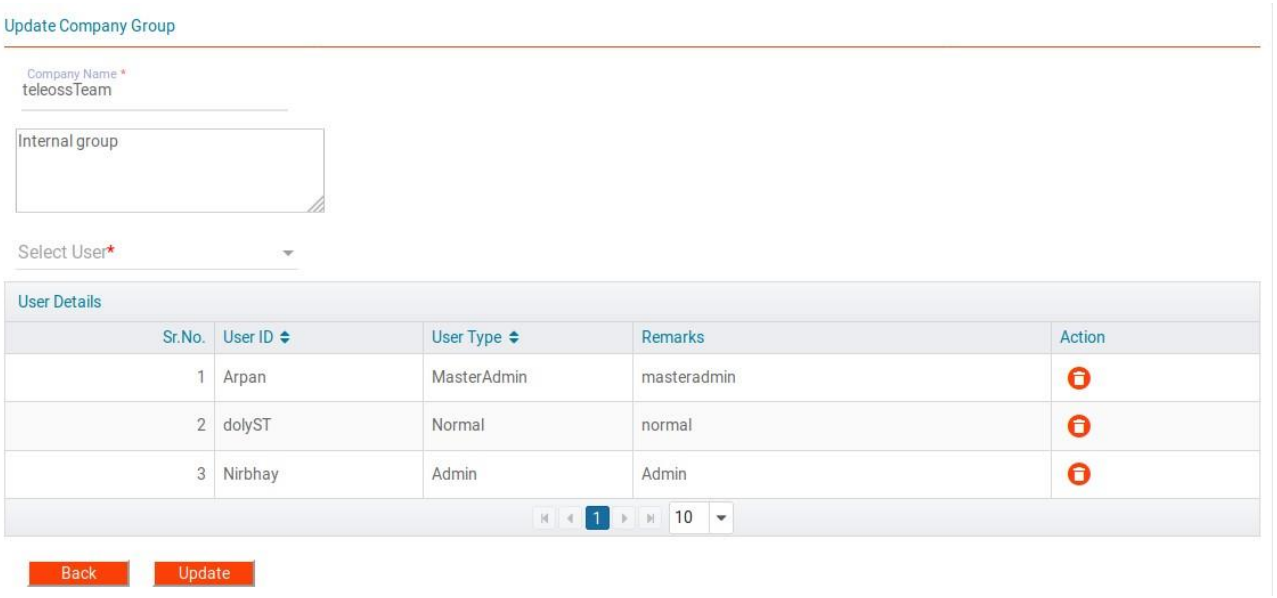

Figure 8-3 Edit (Update) Company Group

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.

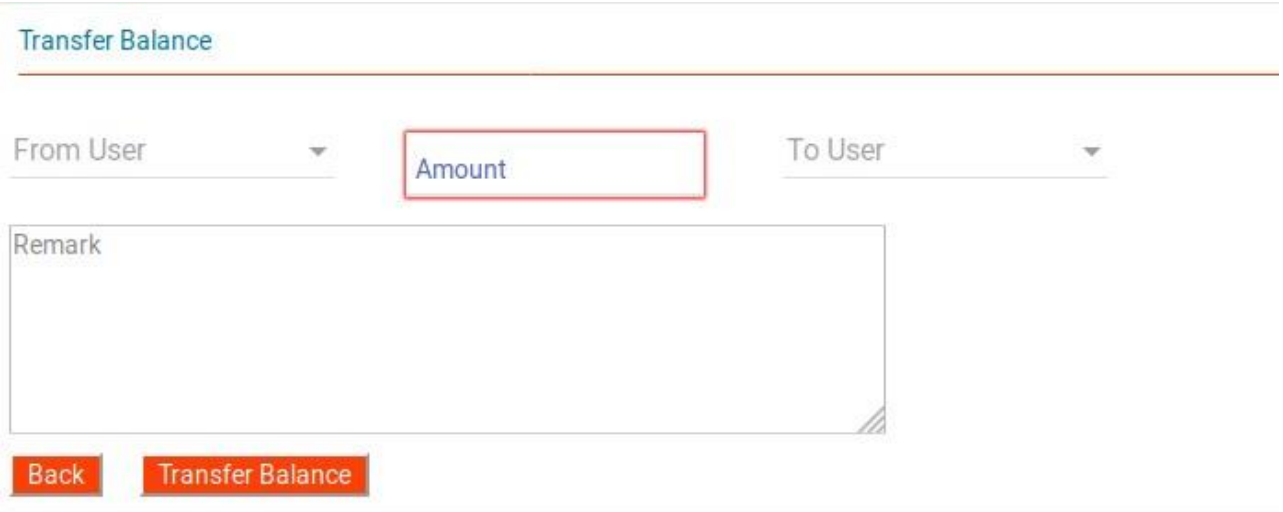

Figure 8-4 Transfer Balance

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.

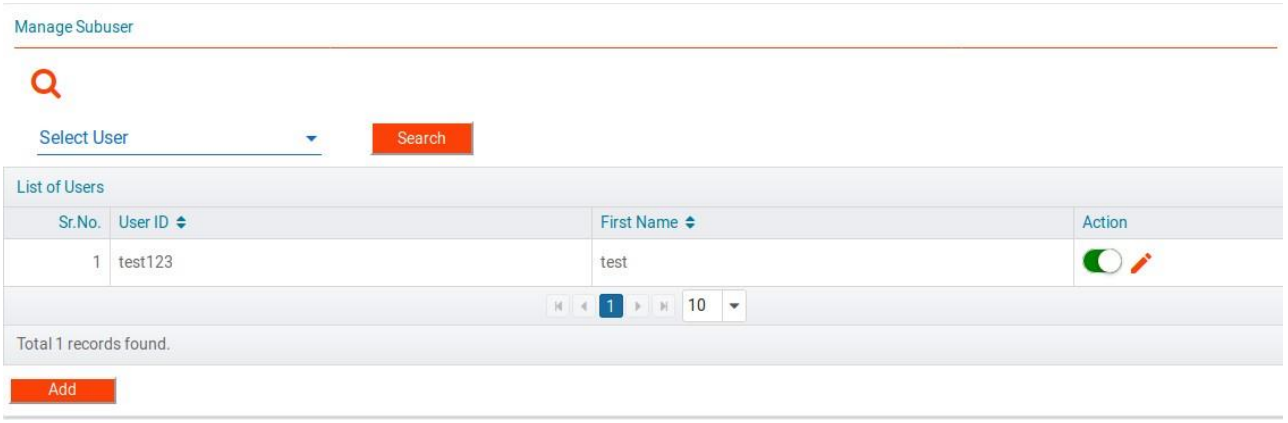

Figure 8-5 Manage Sub-Users

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.

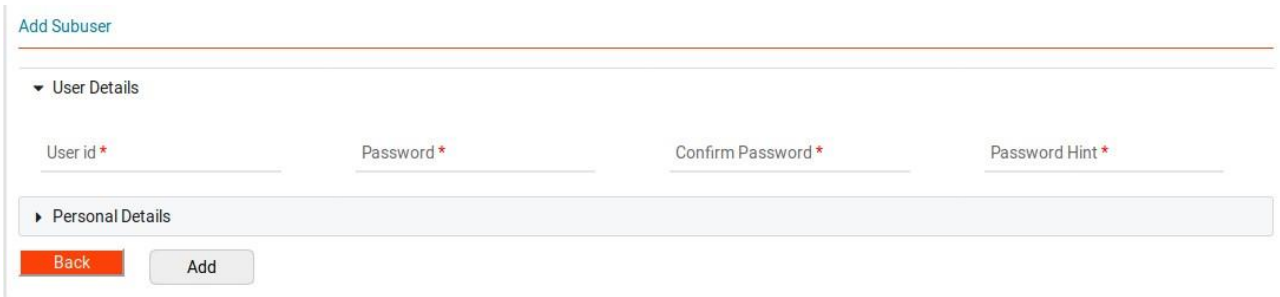

Figure 8-6 Add sub-user – User Details

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.

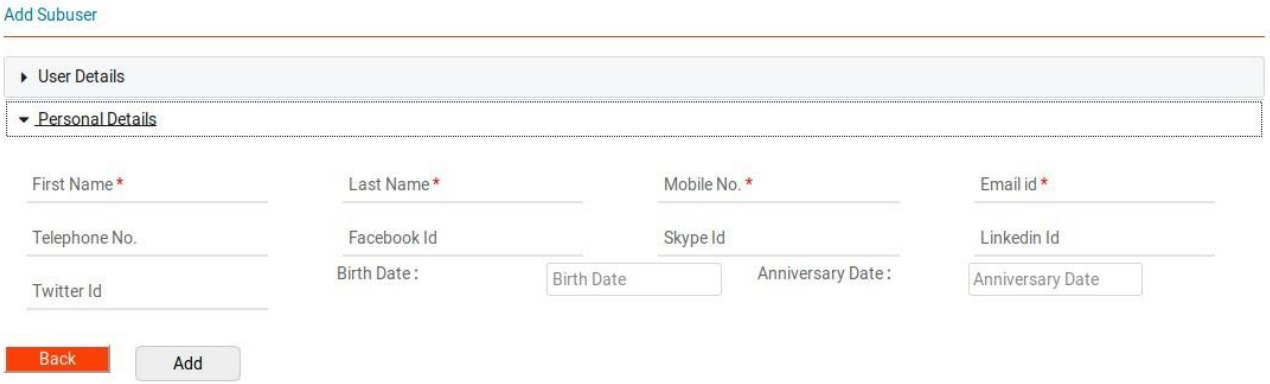

Figure 8-7 Add sub-user – Personal Details