



Easy Message Lite

User Guide

V2.0

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Profiles and how to use them

Once you have subscribed to Easy Message Lite, or have logged in for the first time, you will be taken to the profiles page. Think of a profile as a user.

Note : If you require security between users, use TxTStream sub accounts and subscribe each account. There is no charge for this. Sub accounts can be created and maintained by you in the My accounts area of the TxTStream website.

Current profile : **Mark**, Reply address : mark.jenks@woosh.co.nz, From name : EasyMessage

Profile	Default?	Reply address	From name	Max Length	
Select Make default	Default	No	mark.jenks@woosh.co.nz	TxTStream	160
Select Make default	Guy	No	guy@logicalnetworks.co.nz	TxTStream	160
Select Make default	Mark	Yes	mark.jenks@woosh.co.nz	EasyMessage	320

Add/Edit Profile

Profile Each profile requires a unique name

Reply address When you send an SMS text or an email, this is where the mobile or email reply will be sent to, including any non-delivery notifications

From name An SMS text is formatted 'FromName:YourMessage' so the from name identifies who the text is from. You will want to make this as short as possible so as not to take up SMS space

Maximum length This applies to the maximum character length of an SMS message. The system will charge in blocks of 160 characters. You are allowed to concatenate up to three messages together for a maximum length of 459 characters

Add/Update Profile

A default profile will have been created for you. The default profile may be edited but cannot be deleted. Add as many profiles as you need.

Profile – A name to identify the profile.

Reply address – An email address where any replies from SMS texts or outbound emails will be sent to. This address will also be used to send you batched non-delivery notifications if we couldn't confirm that SMS texts were received by the mobile within an hour.

From name – This will precede your message when sending texts. It allows the text recipient to easily identify who the text is from.

Maximum length – The maximum number of characters that may be sent using this profile. May be 160-459 characters allowing up to three concatenated texts to be sent. Concatenated texts appear on the mobile as one long text. Be aware that texts are charged in 160 character blocks and that the From name described above is included in the count.

Once you have created your profile or edited the default, on subsequent logins to Easy Message you may supply the profile name and go directly to the contact list page on login.

Sending SMS text messages and emails by manually entering recipients

Click on the Messaging menu item to access the following page :

The screenshot shows the 'Send message' interface. At the top, it says 'Send message' and 'Logout | User gui'. Below that, it shows 'Profile : Default, Reply address : mark.jenks@woosh.co.nz, From name : TxtStream'. The main form has sections for 'Message detail', 'To (email or mobile)', 'SMS text', and 'EMail subject'. Below the subject field is a rich text editor with various icons for text formatting, alignment, and linking. A red 'Send message' button is at the bottom. Two blue callout boxes provide instructions: one points to the HTML icon in the editor toolbar, stating 'Email text editor. HTML may be cut and pasted. If a template that has email text is selected, it will be provided here'; the other points to a square icon in the toolbar, stating 'Use this icon to switch to full screen editing'.

To email or mobile – You may type email addresses and mobile numbers, or cut and paste from other sources. Multiple entries can be separated by commas, tabs, spaces or be on a line of their own. If you are sending both emails and texts, these can be mixed as required. Mobile numbers may be in international format e.g. +6100000, in local format e.g. 02100000 and may contain punctuation e.g. 021-000-000 or 6421-0000-0000.

SMS text – Only required if sending SMS texts. A character count will let you know how much space you have left depending on your profile's maximum length setting. If a template was selected that has SMS text, then the message will already be supplied and may be edited.

Email subject – Only required if you are sending emails.

Email text – May be plain text, pasted HTML (click on the HTML icon first) or full HTML presentation text which will usually come from a template. Only two replaceable parameters are allowed when sending to manually entered recipients, these are the tracking marker and the unsubscribe facility. Replaceable parameters are covered in much more detail below.

Attachment – If you have uploaded attachments, an attachment to the email may be selected. Note that if the attachment is larger than 250KB, it will appear in the email as a link rather than incorporated within the email.

Delay till – Delay delivery until the specified date and time.

Once you supplied the information required, click Send message. You will be informed of the number of recipients and if the message(s) will be sent immediately or queued. If the message has more than 50 recipients, or an attachment larger than 250KB has been used, or a Delay till date and time supplied it will be queued. Typically (if Delay till hasn't been used), the message will be queued for a couple of minutes before being sent.

How to message, manage, edit, create and import contacts

Click on the Contacts menu item :

The screenshot shows the 'Contact Lists' page with the following callout boxes:

- Manually add a new contact list**: Points to the 'New contact list' link.
- Upload (or add to an existing list) Excel spread sheets and .csv files**: Points to the 'Upload a file (comma delimited .csv or Excel...)' link.
- Click on column headers to sort**: Points to the 'List name' header.
- The profile that created the list**: Points to the 'Created' column.
- Open a list. Once open you can add, edit and delete members as well as quick SMS**: Points to the 'Open' link for the 'SYS.OptedOut' list.
- Click on send message to send an SMS text and/or email to all or only selected recipients from a list**: Points to the 'Send message' link for the 'ExtraSupportersRegistrants.csv' list.
- How the list was created and what type of list**: Points to the 'Type' column.
- The number of upload errors. If this is not 0, click on the errors link at the left of the screen for details**: Points to the 'Errors' link for the 'whole school.csv' list.

	List name	Description	Type	Created			
Open	SYS.OptedOut	List members who have opted out	System	20 Jun, 2012		1	0
Open Send message	ExtraSupportersRegistrants.csv	Test a csv file	File upload	17 Jun, 2012	Default	2	0
Open	Test manual list add	my Test add	Manually added	17 Jun, 2012	Default	0	0
Open Send message Errors	whole school.csv	Test whole school	Upload with add	14 Jun, 2012	Default	960	14
Open Send message	TestContactList	my first test contact list	Legacy	14 Jun, 2012	Default	1	0
Open Send message	GM Example.csv		Legacy	27 Mar, 2012		3	0
Open Send message	Infinitus demo file.csv		Legacy	3 Jun, 2011		2	0
Open Send message	trialTS.csv		Legacy	18 Aug, 2010		1	0
Open Send message	Group Messaging demo.csv		Legacy	1 Oct, 2009		4	0
Open	xx.txt	xx	Emergency contacts	6 Aug, 2009		3	0

Contact lists may be manually created, or uploaded from a .csv (text) file or from an Excel spreadsheet (any version). Once a contact list is created, you may add or edit it manually, or add to it from a file.

There are two special types of contact lists:

- **Emergency contacts** – this is a contact list that has been designated as the emergency contact list in the Settings, Emergency broadcast menu item. This list allows a mobile initiated message to broadcast an emergency message (SMS and/or email) to all of the contacts in the list in an emergency notifications situation. Once a list has been designated as an emergency contacts list you can edit it but cannot delete or Send message it. Emergency contacts lists are created in the normal way, either manually or through file upload. Further details are available in the emergency broadcast section.

- **SYS.OptedOut** – When a mobile replies to one of your SMS messages with STOP the recipient is considered to have opted out and you cannot send any more messages to that mobile. This is a legal requirement under the Telecommunications act. Likewise, when you send an email and include an unsubscribe link (see the section on the template editor), and the recipient of the email clicks that link, the recipient has indicated that they do not wish to receive further email communication from that source. To assist with managing contacts, overnight, the system will clean any existing contacts lists of opted-out recipients, remove them from your lists and place them in the SYS.OptedOut list. Be aware that even if you re-upload them, or add them manually, the system will not allow you to send messages to these recipients in the future. You will receive an email to the reply email address indicating that the recipient has previously opted out.

Open and edit contacts

The screenshot shows a contact list interface with the following callout boxes:

- Add a new contact**: Points to the 'Add a contact' button.
- Click on a letter or all for 'starts with'**: Points to the alphabetical navigation bar.
- Use the search box for 'item contains'**: Points to the search input field.
- Click on column headers to sort**: Points to the column headers in the table.
- Quick SMS to the mobile**: Points to the mobile phone icon in the first column.
- Quick email to the email address**: Points to the envelope icon in the second column.
- If a contact has been edited or added it will display in *italics* at the top of the list regardless of search criteria**: Points to the first row of the contact list.

Mobile	Email	First	Last	Full	UDF1	UDF2	UDF3	UDF4	UDF5
<i>21618921</i>	<i>guy</i>	<i>lincoln</i>	<i>guy</i>	<i>lincoln</i>					
21618732	guy	lincoln	guy	lincoln					

User defined fields and replaceable parameters

When you edit or add a contact, as well as access to the usual name, email and phone fields, you can also supply user defined fields. There are five fields available, UDF1 to UDF5. These user defined fields can then be included in texts and emails along with the personalised name data of each contact.




The following replaceable parameters are available :

- **\$N\$** for name, **\$LN\$** for last name and **\$FN\$** for first name
- **\$UDF1\$** to **\$UDF5\$** for user-defined fields

If you were to type in a text or email message (or if you had created and selected a template) that looked like :

Hi \$fn\$, we have noticed that your account \$udf1\$ is overdue. Please call us and quote ref:\$udf2\$ before 4pm today. Thx

And a contact looked like :

	Mobile	EMail	First	Last	Full	UDF1	UDF2	UDF3	UDF4	UDF5
  	21000000	guy@xx.com	guy	lincoln	guy lincoln	123456	987654			

The actual message received via text or email would read :

Hi guy, we have noticed that your account 123456 is overdue. Please call us and quote ref:987654 before 4pm today. Thx

So what happens if there was no first name on the contact? The \$fn\$ parameter would be replaced by nothing, i.e. \$fn\$ would be removed. If you are using replaceable parameters, make sure you construct your messages in such a way that if the data is not present, the message still reads ok.

Replaceable parameters are not case sensitive. \$FN\$ is the same as \$fn\$ or \$Fn\$.

Sending a message to all or individual recipients of a contacts list

When you click on send message next to a contacts list, you will see the following page :

Send message to contact list Logout | User guide

Profile : **Default**, Reply address : **mark.jenks@woosh.co.nz**, From name : **TxTStream**


Message detail

Contact list:
Select individual recipients from specified list?

SMS text:

E-mail subject:

Enter and edit any email text below or cut and paste HTML. If pasting HTML code, click on the <HTML> icon first...



Attach:

Delay till:

This page contains mostly the same fields as when sending messages to manually entered recipients.

It differs in three main respects: the contacts list is already selected, there is a yes/no drop down that allows you to select individual recipients from the list rather than the whole list and you may use replaceable parameters to personalise the message.

If you choose to select individual recipients from a contacts list, enter all of the message details in the appropriate fields and then upon clicking Send message, Easy Message will allow you to select individual recipients.

Uploading files to contact lists

.csv files (comma delimited files which can be exported from almost any application) and .xls and .xlsx (Microsoft Excel older versions and 2010/2013/365) files can be uploaded.

Clicking on the upload link will show this page :

File upload Logout |

Upload

File name Use the browse button to locate the file you wish to upload as a contact list

Add to existing list Select only if you want to add the file's contents to an existing contact list

Description Optional but desirable to identify the list. If you have chosen to add to an existing contact list, any description you enter here will replace any existing description

Excel (older versions as .xls and newer versions as .xlsx) and .csv (comma-delimited) files may be uploaded.

Almost all software has the ability to export contact information as .csv files e.g. Outlook, Windows live, GMail, HotMail, Facebook etc.

Browse for the file to upload and choose if you want to create a new contacts list or add this file to an existing list. If the system detects duplicate mobile and/or email addresses in an existing contact list being added to, it will overwrite the existing contact. This prevents duplicates and allows you to safely 'refresh' a list.

Note that if you have already uploaded a file, let's say 'myContacts.xlsx', you will not be allowed to upload that file again unless you rename it or choose to add it to an existing list or delete the existing contact list with that file name first.

Once the file has been transferred from your computer, the system will look for column headers in the first row of both Excel and .csv files and try to map these to the data it needs. In the example below, the system has identified two fields and requires selection for the other two :

File upload

Confirm column mappings

NAME ...should be treated as...

CLUB TEAM ...should be treated as...

EMAIL ...should be treated as...

CELL PHONE ...should be treated as...

The columns within the file are displayed on the left. Where the system couldn't detect what the columns should be mapped as, use the drop down box and select the correct field name.

Once you have mapped a particular file format, Easy Message will remember your mappings for next time.

The system will then load the file and let you know if there are any errors. If there were upload errors, use the errors link next to the contact list name.

⇨ **Upload errors**

[Back to contacts](#)

Contact list : whole school.csv, Test whole school

Error date	Error text
23 Jun, 2012	Line #36 mobile is not numeric, blank and email address is blank
23 Jun, 2012	Line #99 mobile is not numeric, blank and email address is blank
23 Jun, 2012	Line #351 mobile is not numeric, blank and email address is blank

Checking on delivery status and viewing replies

In order to track email opens (whenever an email is opened) and unique opens (different recipients that opened a message as one recipient may open an email a number of times), it is necessary to create an email template and insert the tracking option. This is explained in more detail below when we document using templates. Using the template editor, you can also provide an unsubscribe option in your emails and these will then be tracked and reported as opens are.

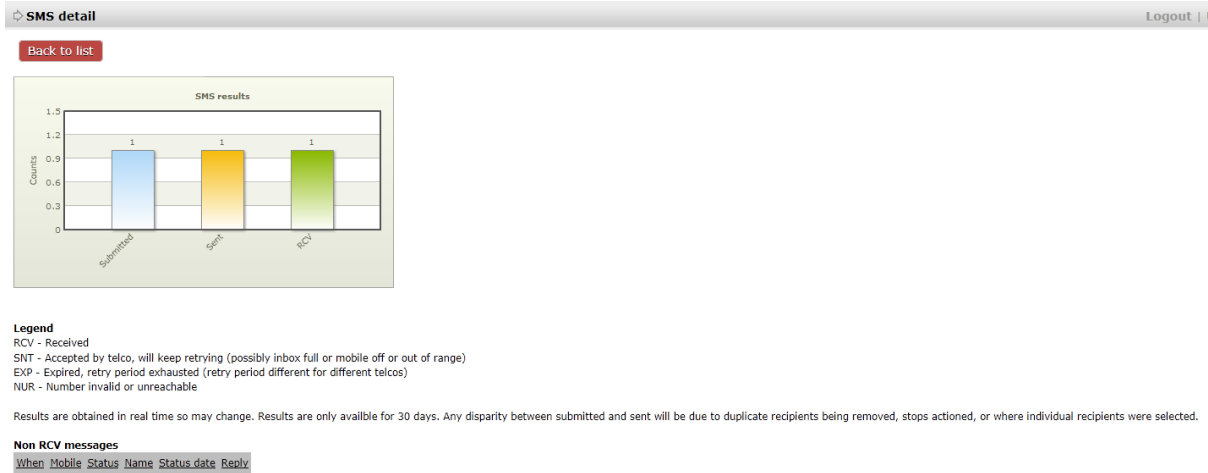
We should explain that tracking email opens is not 100% accurate, and isn't for any email tracking system. The tracking mechanism uses an image that cannot be seen, embedded in the email, and some email clients may have automatic image display turned off. Also, unique opens are tracked by the recipients IP address. On some (e.g. corporate email servers), several recipients may appear as the same recipient.

Keeping all this in mind let's look at the delivery report page for immediate delivery (queued delivery is very similar) :

The screenshot shows a table titled "Immediate delivery" with the following columns: Created, Group name, SMS, EMail, Type, To, SMSText, and EMailText. The table contains several rows of data. Callout boxes provide the following explanations:

- When the message(s) were sent:** Points to the "Created" column.
- An internal description:** Points to the "Group name" column.
- The first 160 characters of the SMS text and/or the email text:** Points to the "SMSText" and "EMailText" columns.
- The number of SMS texts and/or emails actually sent:** Points to the "SMS" and "EMail" columns.
- The recipient(s). Three dots indicate more recipients:** Points to the "To" column.
- Links to drill-down to individual message results for both SMS and email:** Points to the "SMS rest" and "EMail rest" links in the first column.

If we clicked on an SMS results link in the above listing we would see a page like :



Any non RCV (received) SMS text messages will be listed with a status and the various statuses are explained in the legend. This list will also include any mobile replies. Sort the list on reply status (click on status) to sort replies to the top of the list.

One thing to be aware of with the delivery reports are the time delays. Reports are displayed in real time, so the results may change. Where a mobile is switched off, the message may be delivered hours later. Also, each telco has different expiry periods, some will expire messages after 24 hours and no longer attempt delivery.

Email is particularly problematic in this respect with some bounce-backs not getting back to us for days. The opens, unique opens and unsubscribes however are real time.

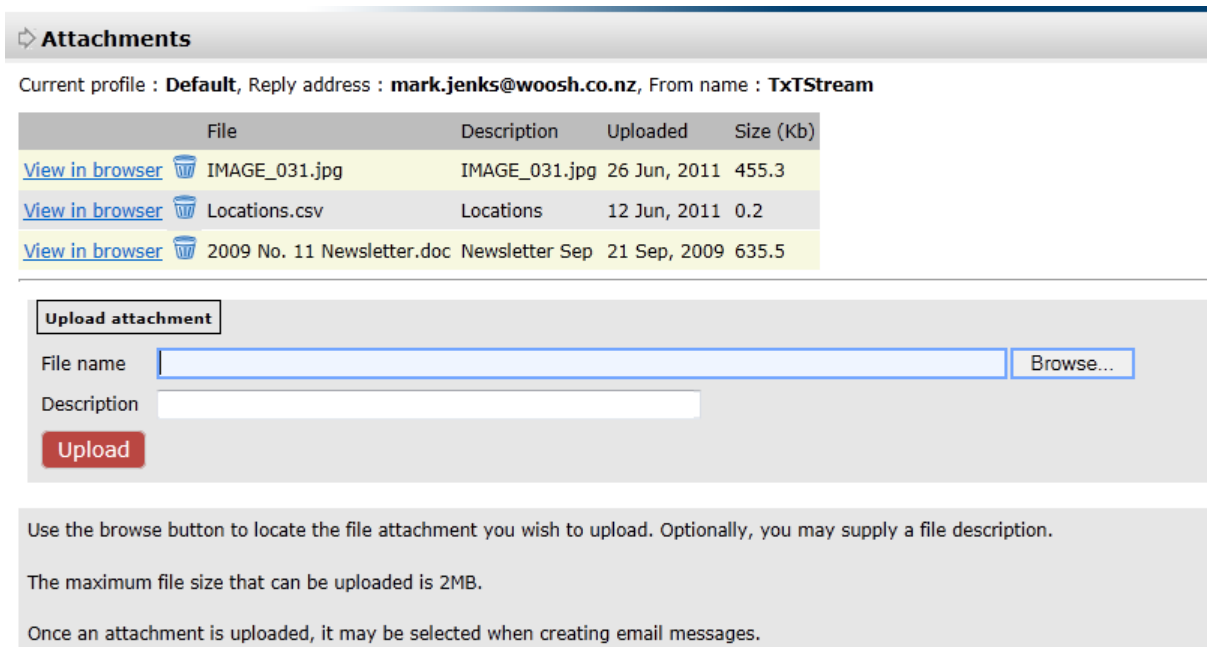
Uploading attachments

When creating manually entered recipient email messages and when sending to email addresses using a contact list it is possible to add an attachment to the email.

This is great for adding images, documents e.g. newsletters etc. to your outbound emails.




Uploaded attachments can be a maximum of 2MB. Also remember that if an attachment is over 250KB in size it will be added to the email as a link, and for that link the description supplied when the attachment was uploaded will be used.

Here is the upload attachments page available from the Attachments item of the Settings menu :



Attachments

Current profile : **Default**, Reply address : **mark.jenks@woosh.co.nz**, From name : **TxtStream**

File	Description	Uploaded	Size (Kb)
View in browser  IMAGE_031.jpg	IMAGE_031.jpg	26 Jun, 2011	455.3
View in browser  Locations.csv	Locations	12 Jun, 2011	0.2
View in browser  2009 No. 11 Newsletter.doc	Newsletter Sep	21 Sep, 2009	635.5

Upload attachment

File name

Description

Use the browse button to locate the file attachment you wish to upload. Optionally, you may supply a file description.

The maximum file size that can be uploaded is 2MB.

Once an attachment is uploaded, it may be selected when creating email messages.

To view the attachment use the view in browser link which will open the attachment in a popup browser window.

Here is example text that will be included in an email that uses large attachments. The text below the dashes will be the actual email text and no description was provided when uploading the attachment so the system used the file name :

A large document or other attachment has been included with this email...

To access this attachment, please click on the link below...

[Click here for IMAGE_031.jpg](#)

Simple email not using a template just to show how a large attachment looks when sending in an email

Emergency broadcast

Easy Message emergency broadcast was implemented due to customer demand after the first Canterbury earthquake. Since then it has been used many times by various companies, community groups, clubs and schools as a means to send a broadcast SMS text and/or email to a defined group of recipients during emergency situations.

Emergency broadcast allows designated, authorised mobiles to send a mobile initiated text to a short code (in this case 3255 or 384) that initiates the broadcast of a pre-defined or supplied message to a designated emergency broadcast contact list. In emergency situations, SMS text is, if communications infrastructure is compromised, often one of the last means of communication to be affected.

Before we look at the actual fields and setup, here are the instructions at the top of the emergency broadcast page :

Emergency settings

Setup steps...

- Create a contacts list for your emergency contacts.
- Determine who will be able to initiate emergency broadcast messages and provide that information here.
- Using the explanations beside each field, complete the form below.
- Contact each emergency broadcast initiator and supply clear instructions on how to initiate an emergency broadcast message. These instructions are below.

Testing...

- Create or upload a small contacts list with perhaps a couple of mobile numbers and one or two email addresses if required.
- Fill out the form ensuring you select the small list for testing purposes.
- Action the emergency broadcast as per below.
- Once you are happy with the test results, select the emergency recipients contacts list and save.

Actioning an emergency broadcast message...

- Text the word **ecode** followed by the emergency message to 3255 or 384 e.g. ecode emergency earthquake procedures in force.
- The initiating mobile MUST be a New Zealand mobile to access New Zealand shortcodes i.e. 3255 and 384.

The emergency broadcast settings page with full explanations against each field :

Edit settings		
Allowed mobiles	<input type="text" value="0211405843"/>	Enter the mobile numbers that are allowed to initiate an emergency broadcast message. Separate the mobiles by a space. You may supply up to approx. 12 mobile numbers. e.g. 023111111 024222222.
Contact list	<input type="text" value="xx.txt (3)"/>	Select the contacts list that contains the emergency broadcast message recipients. The list may contain a mix of mobiles and emails as required. Once a list is selected here, you may still edit the contents online. However, you cannot delete the list or replace it unless you deselect it here first, replace the list and then reselect it.
From name	<input type="text" value="EmergencyTest"/>	This from name is at the beginning of each emergency sms and email to identify its source. You may set this to be different to the profile from name for clarity in emergency situations.
Default message	<input type="text" value="Default emergency testing message"/>	The emergency message will in most cases come from an initiating mobile. You must supply a default emergency message here. Any message supplied by an authorised mobile will override this.
Response	<input type="text" value="Emergency broadcast actioned..."/>	This response will be sent immediately to an initiating mobile to confirm that the emergency broadcast has been actioned.
Reply email	<input type="text" value="mark.ienks@woosh.co.nz"/>	A recipient of an emergency broadcast message may reply via mobile or email. The replies will be sent to this address.
<input type="button" value="Save"/>		

Using templates, template editing and presentation emails

Templates allow you to create and save both SMS text templates and presentation or plain text email templates for repeated use.

Templates of both types can contain replaceable parameters enabling you to personalise messages and also to insert email open tracking and unsubscribe facilities.

Easy Message uses a fully featured HTML editor that allows you to create full presentation emails and also includes an API to access Flickr as a convenient place to upload/download images from. An API for YouTube is also provided.

Once templates are created they can be selected for use in both manually entered recipient messaging and messaging from a contact list.

Let's take a look at the templates page under the Settings menu :

The screenshot shows the 'Templates' page in the Easy Message settings. At the top, there is a 'New template' button. Below it is a table of templates. A callout box points to the 'New template' button, stating: 'Create a new SMS text and/or email'. Another callout box points to the 'TestTemplate1' row, stating: 'This template is selected and as such will automatically supply the SMS text and/or email text whenever you go to messaging or send to a contact list'. A third callout box points to the 'Edit' icon for 'TestTemplate1', stating: 'Once a template is created, choose edit to add SMS template text and/or email text'. A fourth callout box points to the 'SMS Text' and 'EMail Text' columns, stating: 'The SMS text and/or the email text may not show quite the way you expect here. Email text, especially if it is HTML i.e. presentation emails, may be stripped of some of its formatting'. Below the table, there is a note: 'Once a template is selected, the SMS and/or email text will be used when creating new messages. For new templates, add the template, then edit it to access the SMS and email text.'

Selected	Name	SMS Text	EMail Text			
<input checked="" type="checkbox"/>	TestTemplate1	This is test template1 sms text1	This is test template 1 email text1			
<input type="checkbox"/>	TestTemplate2	.	Mark Jenks www.txtstream.co.nz/www.txtengine.co.nz <			
<input type="checkbox"/>	TestTemplate3		gdfgdfgdfgdf <a id="logo" href="http://			
<input type="checkbox"/>	TestWordPaste		<v:shapetype i			
<input type="checkbox"/>	MyTestEMail		<table style="MIN-WIDTH: 500px; WIDTH: 550px; BORDER-COL			
<input type="checkbox"/>	TestTOandUnsub		Test the TO! and the unsub \$TO\$<img			
<input type="checkbox"/>	TestApptTemplate		\$TO\$	TestHTMLPaste		<table class="outline" cellpadding="0" wid

Once a template is selected, the SMS and/or email text will be used when creating new messages.
For new templates, add the template, then edit it to access the SMS and email text.

When you edit a template, the following page is displayed :

SMS text can only be actual text including any replaceable parameters. Remember that when you use manually entered recipient messaging to send an SMS text or email, that certain data will not be available such as name, full name etc.

The email text can be just plain text with replaceable parameters. It can also be fully formatted presentation HTML.

Keep in mind that once you are in the HTML editor, you can cut and paste full HTML from any source, be it Word, a webpage or a file, click on the HTML editor icon first.

The Telecommunications act and things you need to know

The N.Z. Telecommunications act and its amendments and the Unsolicited Electronic Messages act 2007 govern what you can and cannot do with respect to sending text and email messages to recipients.

TxtStream is implacably against SMS text and email spam and as our terms and conditions state (available from the bottom of our homepage at www.txtstream.co.nz or www.easymessage.co.nz), we will take action against accounts that spam or breach the terms of both our terms and conditions and the act(s).

There are a few points you need to be aware of :

- You cannot, under any circumstances, purchase a list of mobile numbers and/or email addresses from any supplier and then communicate with them. It is illegal
- If your message via either SMS text or email is a marketing message, you must have explicit electronic, written or verbal permission from the recipient
- In the case of a marketing message, where you have that permission, you must provide, in the case of email, an unsubscribe link (see above under template editing) or in the case of a SMS text you must suffix the message with something similar to '2 optout,reply STOP' regardless of whether this causes two messages to be sent or shortens your message space

Easy Message will not, as described in a section above, communicate to any mobile number that has opted-out by replying STOP, or to any email address that has used the unsubscribe facility.

Please refer to http://www.dia.govt.nz/diawebsite.nsf/wpg_URL/Services-Anti-Spam-Questions-and-Answers?OpenDocument and <http://www.dia.govt.nz/> for more information.