MoCo™ SMS Suite

Quick Guides for Direct Marketing and CRM

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Chapter 1: Introduction

1.1 Purpose

The purpose of this document is to provide a Quide Guide for customers who are using MoCo for direct marketing and customer relationship management (CRM).

1.2 Target Audience

The target audiences of this document are all customers who will be using MoCo to perform direct marketing and/or CRM. This includes all sole proprietors, marketeers, small business owners, retailers, spa and beauty centre operators, restaurant owners, etc.

Chapter 2: Client Database Management

2.1 Export Address Book to file

The entire address book can be exported to either a csv (comma-separated values) file or a tab-delimetered file. Both types of files can be openned by Microsoft Excel. You can choose which field within the database to export out.

To Export Address Book,

Step 1: From the File menu, click on the Export Address Book

Step 2: On the **Export Address Book** dialog, check the individual field name checkbox to select the export content. Click on the **Browse** button to select the location and file name of the saved file.

Step 3: Select the type of output file by choosing the delimeter type. You can choose either "Comma" or "Tab".

Step 4: If you wish to include contact group information in the exported file, checked the "Include contact group information" option.

Step 5: Click **Export** button to complete operation.

2.1.1 Open Exported File using MS Excel

To open the exported file in MS Excel:

Step 1: Open Microsoft Excel.

Step 2: Click "Open" under the "File" menu. A dialog box will be displayed for you to select the file to open.

Open			? 🔀
Look in:	🛅 MoCo TestBed	💌 🎯 - 🖄 🕅 😋 🗙 🔛 🎹 - Tools -	
My Recent Documents Desktop My Documents My Computer	Account Sheet.txt Al Records.txt Al Records.txt Dennis Appt History, Export Addr bookl.c Import Addr bookl. Import Addr bookl. Import Addr bookl. Import Addr book. Import Addr book. Import Addr book. Mocol.og/0202007.1 MoCol.og/2022007.1	Query Reports.txt Gurvy Result.txt Today Report.txt Today Report.txt Gurvy Miner Result.txt Today Report.txt Today Report.tx	
My Network Places	File name: Files of type: Text File	s (*.prn; *.txt; *.csv)	Open 🔹

Step 3: Select the file and click "Open". You will see a warning message box as below. Click "Ok".

Microsof	t Excel
1	This file is not in a recognizable format. • If you know the file is from another program which is incompatible with Microsoft Office Excel, click Cancel, then open this file in its original application. If you want to open the file later in Microsoft Office Excel, save it in a format that is compatible, such as text format. • If you sughed, click Help for more information about solving the problem. • If you still want to see what text is contained in the file, click OK. Then click Finish in the Text Import Wizard. OK Cancel Help

Step 4: You shall see the "Text Import Wizard – Step 1 of 3" dialog box as shown below. Make sure the "Delimited" option is selected. Click "Next" button.



Step 5: You shall see the "Text Import Wizard – Step 2 of 3" box. Make sure the "Tab" and "Comma" options are selected. Click "Next" button.

Text Import Wizard This screen lets you set how your text is affect	- Step 2 of 3 the delimiters you ed in the preview b	ur data co below.	ntains. Yo	u can see		?
Delimiters Iab Se Space Qt Data greview	micolon 🔽	<u>omma</u>	Trea	at consecutiv kt gualifier:	ve delimiter: "	s as one
Dennis Chang Foo Chee Yong Daniel Chua Bric Boo Chang Cheow Joo	+6591181254 +6596988152 +6598465863 +6581983951 +6581239211	F 1 F 1	iends; iends;			
						>
		Cancel		ack	<u>N</u> ext >	Einish

Step 6 : You shall now see the "Text Import Wizard – Step 3 of 3" box. Click on the column that represent the mobile phone numbers, and then select "Text" option under the "Column data format" selection.

ext import wizaru	- Step 3 of 3						? 🛛
This screen lets you sele the Data Format.	ect each column ar	nd set	Colur	n <mark>n data f</mark> General	ormat		
'General' converts nur values to dates, and (neric values to nur all remaining value:	e	[ext] Date:	MDY	*		
Advanc	O Do not import column (skip)						
Polo and an							
Data preview							
General	Text	GenerGe	neral	Genera	1		
General Dennis Chang	<u>Text</u> +6591181254	GenerGe	neral	Geners	1		
Ceneral Dennis Chang Foo Chee Yong	Text +6591181254 +6596988152	GenerGe Fr	neral iends;	Geners	1		
Ceneral Dennis Chang Foo Chee Yong Daniel Chua	Text +6591181254 +6596988152 +6598465863	GenerGe Fr Fr	neral iends; iends;	Geners	al		
Ceneral Dennis Chang Foo Chee Yong Daniel Chua Bric Boo	T <u>ext</u> +6591181254 +6596988152 +6598465863 +6581983951	<mark>GenerGe</mark> Fr Fr	neral iends; iends;	Geners	1		
Ceneral Dennis Chang Foo Chee Yong Daniel Chua Eric Boo Chang Cheow Joo	Text +6591181254 +6596988152 +6598465863 +6581983951 +6581239211	GenerGe Fr Fr	neral iends; iends;	Geners	<u>al</u>		
Ceneral Dennis Chang Foo Chee Yong Daniel Chua Bric Boo Chang Cheow Joo	T <mark>ext +6591181254 +6596988152 +6598465863 +6581983951 +6581239211</mark>	<mark>GenerGe</mark> Fr Fr	neral iends; iends;	Ceners	al		

Step 7: Click "Finish" button. The exported file shall be successfully loaded into Microsoft Excel. You can now save it into MS Excel format.

2.2 Import contacts into Address Book

You can import contacts information into MoCo's Address Book. The import file can be either in csv (commaseparated-values) format, or a tab-delimetered file, or a MS Excel file (*.xls).

MoCo's import function is extremely user friendly. You will be able to assign any column to import a specified field in MoCo's address book. There is no fixed structure for importing data.

2.2.1 Prepare Import File (csv/txt) from existing database

To prepare import file (csv/txt) from your existing Microsoft Excel spreadsheet,

Step 1: From the File menu, select "Save As ..." option.

Step 2: A "Save As" dialog box will appear.

A		В	C	D	E	F	G	Н	- I	J	K	L	М	N	0	Р	Q	R,
1 Dennis Chang	46591	Save As										-						-
2 Poo Chee Yong 3 Daniel Chua	40039	June no						Ar										
4 Eric Boo	+6581	Save in:	C MoCo Te	estBed		Y ()	- 🖪 I Q	X 🗋 🗖	* Tools *									
5 Chang Cheow Jo	0 +6581		Export Ad	dr book1.csv								-						
6 Hark Loong	+6696		Export Ad	dr book.csv														
7 Kahshin	+6690	My Recent Decrements	Import Ad	dr book 1.csv														
8 Mun Kiat	+6597	Dataments	Import Ad	dr book 2.csv														
9 Wilson Chia	+6596		Import Ad	dr book 3.csv														
10	-		Timport Ad	dr DODK 4.CSV Ar bask 5. cm														
11	-	Desitop	Treort Ad	dr book 5.csv dr book 6.cm														
12	-		S Incort Ad	dr book 7.csv														
14											-							
15		My Documents									-							
16												-						
17																		
18		Jan Stranger																
19		my computer																
20	_	(1)							_									
21	_	3	File game:	Import Addr	book1.csv			~		Save								
22	-	Places	Save as type:	CSI (Comm	. deleted i	(* cov)		U		accel								
23				Linicole Tex	t (*.tvt)	1 1017												
24				Mcrosoft Ex	cel 5.0/95 v	Workbook (*	.sk)	-										
26	-			Morosoft Ex	cel 97- Exce	el 2003 & 5.	.0/95 Wurkb	ook (*.xis) =				-						
27				Morosoft Ex	cel 4.0 Wor	isheet (*.x	š)	_										
28				Mcrosoft Ex	cel 3.0 Wor	ksheet (*.s	š)	×										
29																		
30																		
31								_		_	_	_						
32																		
33																		
H + + H Export 4	Addr hoc	±1/									()							>

Step 3: Key in the file name to be saved and select the type of file to be saved. For csv file, select "CSV (comma-delimited) (*.csv)" as the file type. For tab-delimited file, select "Text (Tab-delimited) (*.txt)" as the file type.

Step 4: Click "Save" button. The below warning box may appear. Just click "Yes" button.

Microso	ff Excel
٩	Export Addr book1.csv mey contain features that are not compatible with CSV (Comma delimited). Do you want to keep the workbook in this format? To keep this format, which leaves out any incompatible features, click Yes. To preserve the features, click No. Then save a copy in the latest Excel format. To see what might be lost, click hep. Yes No Heb

Step 5: The csv / txt file is saved successfully. Close the MS Excel application.

2.2.2 Prepare Import File (MS Excel) from existing database

To directly import the address book from a MS Excel sheet, you need to convert the "Mobile Number" field (and whatever number fields you have in your database) into a Text field:

Step 1: Open the existing excel file using Microsoft Excel. A sample of the excel file is shown below:

	A	B	C	D	E	F
1	Name	Raw Mobile	Address	DOB	Gender	Group
2	Chee Yong	91112222	Blk 23 Potong Pasir #04-08	11/14/1975	Male	Member
3	CSL	+6592221111	123 Eunos Road	1/20/1972	Male	Non-member
4	Dennis	92223333	Blk 3 Geylang Road #01-234.	11/12/1975	Male	Member

Step 2: Convert column B ("Raw Mobile") into TEXT:

2a. Highlight the column (in this case, column B) to be converted.

2b. Select from menu, "Data -> Text to Columns ..." option.

2c. The dialog box shown below will be displayed. Click the "Next" button.

The Text Wizard has If this is correct, cho	determined that your data is Delimited.	
Original data type	use Next, or choose the data type that best describes your data.	
Choose the file type	e that hest describes your data:	
Delimited	- Characters such as commas or tabs separate each field.	
Eixed width	- Fields are aligned in columns with spaces between each field.	
Preview of selected	data:	
Preview of selected	data:	
Preview of selected	data:	
Preview of selected 1 Raw Mobile 2 91112222 3 +6592221111	data:	
Preview of selected 1 Raw Mobile 2 91112222 3 +6592221111 4 92223333	data:	
Preview of selected 1 Raw Mobile 2 91112222 3 +6592221111 4 92223333 5 93334444	data:	
Preview of selected I Raw Mobile 2 91112222 3 +6592221111 4 92223333 5 93334444	data:	

2d. The dialog box shown below will be displayed. Click the "Next" button again.

onvert Text to Columns Wizard - Step	2 of 3 ? 🔀
This screen lets you set the delimiters your data how your text is affected in the preview below. Delimiters I jab Semicolon Space Other:	contains. You can see
Raw Mobile 91112222 +6592221111 92223333 93334444	
Cance	el < <u>B</u> ack <u>N</u> ext > <u>E</u> inish

2e. The dialog box shown below will be displayed. Select "Text" and click "Finish" button.

he Data Format.	Column data format	
'General' converts numeric values to numbers, date values to dates, and all remaining values to text.		
	O Do not import column (skip)	
Advanced	Destination: \$B\$1	
Data preview		
Text		
Text Raw Mobile		
Text Raw Mobile 91112222 91552221111		
Rext. Rew Mobile 91112222 +6592221111 92223333		
Text Raw Mobile 91112222 +6592221111 92223333 93334444		
Text Raw Mobile 91112222 +6592221111 92223333 93334444		

2.2.3 Configure type of Import file

Before importing the Address Book, you need to select the type of import file that MoCo needs to import. Step 1: At the MoCo software, select "Configuration Settings". A dialog box as shown below will appear.

Basic	🔓 Address Book					
Address Book Scheduler Appointment Book	Area Code to be auto-inserted :	+65				
GSM Terminal	Default SMS Subscription G By default, subscribe to SMS G By default, do not subscribe to SMS					
	- Default Import Address Book Delimiter Format for importing address book :	MS Excel				
	SpreadSheet Name :	Sheet1				
	-Duplication Check	adding/updating contacts				
		Cancel Apoly				

Step 2: Under "Format for importing address book", select the type of import file you are going to import into MoCo's address book. For MS Excel file, you will need to specify the SpreadSheet name also.

Step 3: Click "OK" button.

2.2.4 Import csv/txt/excel file into MoCo

To import from csv file into address book,

Step 1: From the File menu, click on the Import Address Book

Step 2: From the Open dialog box, select the csv or txt file to import into the database. Click "Open" button.

Open						? 🛛
Look in: My Recent Documents Desktop My Documents	MoCo TestBe Export Addr bo Export Addr bo Import Addr bo Import Addr bo Import Addr bo Import Addr bo Import Addr bo	ed ook.l.cov ook.l.csv ook.l.csv ook.l.csv ook.l.csv ook.l.csv ook.l.csv ook.s.csv ook.s.csv ook.s.csv ook.s.csv	T	← <u>€</u>	I 📸 🎹	-
My Computer						
My Network Places	File name: Files of type:	Export Addr book1.csv Comma Separated Values	Files (".cs	v)	•	Open Cancel

Step 3: On the **Import Address Book** dialog, match and select the correct field of each column. If you do not select a field name above the column, that particular column will not be imported.

Name	🗾 Mobile Number	NRIC	Contac
Dennis Chang	+6591181254	57012345A	
Foo Chee Yong	+6596988152	57123436B	Friends
Daniel Chua	+6598465863	S7234567C	Friends
Eric Boo	+6581983951	57345678D	
Chang Cheow Joo	+6581239211	S7456789E	
Hark Loong	+6598268922	S7567890F	
Kahshin	+6593625065	57678912G	
Mun Kiat	+6597429045	57789123H	
Wilson Chia	+6596885046	57891234I	

Step 4: If one of the column of your database contains the name of the contact group, you can select the option "Contact Group" for that column. For contacts who are members of multiple contact groups, the contact group names are separated by semicolons within the column.

Mobile Number	NRIC	Contact Group
+6591181254	57012345A	
+6596988152	57123436B	Friends;Class A
+6598465863	57234567C	Friends;
+6581983951	57345678D	Friends; Class B
+6581239211	S7456789E	
+6598268922	S7567890F	
+6593625065	57678912G	
+6597429045	57789123H	
+6596885046	57891234I	

Step 5: Click Import button to start importing.

Step 6: A dialog box as shown below will appear, displaying the contacts that are imported successfully and those that failed.

Import Result			
Passed Contacts Total number: 9 Chang Cheew-Joo Danist Chua Benist Chua Benist Chua Benist Chua Benist Chua Benist Chua Benist Chua Benist Chua Hark Loong Kahlinn Mun Kal Witson Chia	Failed Contacts	Reason of Failure	
		Save Result Pro	ceed Cancel

Step 7: To save result of the import process, click "Save Result". The result is saved into a text document.

Step 8: To proceed with the import process, click "Proceed" button. To abort the import process, click "Cancel" button.

Chapter 3: Creating Templates

MoCo's Template Editor allows user to create reusable SMS messages. Frequently used SMS can be saved as template and recalled when needed. User will be able to access the created template by right-clicking of the mouse button in all "Message" text boxes, and then choosing from the options "Insert Template" or "Append Template" to include a template into the message.

To add a new template,

Step 1: Click on button to clear Template Information area.

Step 2: Enter template information (template name and content) into respective fields.

- Template Information		
Template Name :	Promotion Template	
Template Content :	Dear customers, we are having a promotion from 3rd April to 20 April. All items will be at least 30% discounts. Come while stocks last From ABC store.	<
	[153 characters]	

Step 3: Click on to save template.

When a template is created successfully, the template name will appear on the List of Templates box.

3.1 Message Tags

MoCo supports the use of "Message Tags" for creating dynamic message content.

List of Templates : Test Template	Template Information-				Add Men
	Template Name :	Test Template			Template
	Template Content :	Hi < <recipient na<br=""><<appl date="">>, < Name>>", - From</appl></recipient>	ime>>, please remember to co <appt time="">>. To confirm, rep ABC Dental.</appt>	me for your appointment at ny SMS "Confirm < <appt< td=""><td>Delete Template</td></appt<>	Delete Template
			Undo Cut Copy		Update Template
		[167 characters]	Paste Delete Insert Message Tag →	Recipient's Name	Clear Entries
				Recipient's Number Originator's Name Originator's Number Specific Date	
				Specific Time Appointment Date Appointment Time	
				Appointment Name	

You can insert message tags into templates by right-clicking of the mouse, and then select "Insert Message Tag" to insert the appropriate message tags.

Currently, MoCo supports the use of the following message tags:

Recipient's Name – This tag shall be used to insert the name of individual recipients at the time of sending. •

- Recipient's Number This tag shall be used to insert the mobile phone number of individual recipients at the time of sending.
- Originator's Name This tag is only used in the "Forward to selected Recipients" action of the "Automatic Response System". It shall insert the name of the originator of SMS into the message.
- Originator's Number This tag is only used in the "Forward to selected Recipients" action of the "Automatic Response System". It shall insert the mobile number of the originator of SMS into the message.
- Specific Date This tag is only used in the Scheduler. It shall insert the specific date of the scheduled SMS sending into the message.
- Specific Time This tag is only used in the Scheduler. It shall insert the specific time of the scheduled SMS sending into the message.
- Appointment Date This tag is only used in the Appointment Book. It shall insert the appointment date into the message.
- Appointment Time This tag is only used in the Appointment Book. It shall insert the appointment time into the message.
- Appointment Name This tag is only used in the Appointment Book. It shall insert the appointment name into the message.

Chapter 4: Customer Relationship Management (CRM)

MoCo's *Event Manager* allows user to create periodic event to send SMS. With Event Manager, greeting messages like Birthday, New Year, Christmas and Anniversary can be created and SMS will be send automatically once the date is reached.

4.1 Add new Event

4.1.1 Add new Event based on Specific Date

To add a new event based on Specific Date,

Step 1: Click on step 1: button to clear Event information area.

Step 2: Enter event information into respective fields.

-Event Information			
Event Name :	New Year Greetings		
Message Content : [49 characters]	Hi < <recipient name="">>, wi</recipient>	ish you a Happy New Ye	earl 🔊
Message Type :	Normal Text 💌	Event Status :	Suspend 💌
Event Timing Inform	nation		
Based on Spec	ific Date	C Based on Address	s Book
Specific Date :	Dec 31 💌	Address Book Fie	eld : 🛛 Date Of Birth 🔍
Period :	Annually 💌	Period :	Annually
Preferred Time	to SMS : 20.00	Preferred Time to	SMS : 10:00
Event Recipients			
Everyone in A	uddress Book		
C Selected Rec	ipients		
Recipient	s		<u></u>
Advanced	J		~

- Event Name Enter a name for the event.
- Message Content The SMS content to be sent when the event's date is reached. You can use template and message tags here also.
- Message Type Indicate the type of message to be sent. Options are "Normal", "8-Bit Data" and "Unicode (Chinese Text)".
- Event Status Suspend or Active. If event status is "Suspend", sms will not be sent even if the event's date is reached.
- Specific Date The date at which the sms will be sent.
- Period Annually or Monthly. In above example, if "Annually" is selected, the sms will be sent out every year on 31st December. If "Monthly" is selected, the sms will be sent out on the 31st of every month.
- Preferred time to SMS Indicate the preferred time of the day to send out sms. SMS will only be sent out when both the event's date and the preferred time is reached.
- Everyone in Address Book Select this option if the sms is to be sent to everyone within the Address Book.
- Selected Recipients Select this option if you only want to send event sms to selected recipients. You can use the Advanced Search Engine for selection of recipients, or simply select from a list of contacts and/or contact groups.

Step 3: Click on save event.

When an event is created successfully, the event name will appear

on the List of Events box.

4.1.2 Add new Event based on Address Book

To add a new event based on Address Book,

Step 1: Click on button to clear Event information area.

Step 2: Enter event information into respective fields.

Event Information						-
Event Name :	Birthday					
Message Content : [38 characters]	Hi < <recipient name=""></recipient>	, happy t	oirthday!			
Message Type :	Normal Text	•	Event Status :	Suspen	d 💌	
Event Timing Informa	ation					
C Based on Specif	ic Date	۲	Based on Addres	ss Book		
Specific Date :	Jan 01	Ŧ	Address Book Fi	ield :	Date Of Birth	•
	Annually	Ŧ	Period :		Annually	•
Preferred Time to	s SMS : 08:00	*	Preferred Time to	o SMS :	10:00	-
Event Recipients — © Everyone in Ac C Selected Recip Recipients Advanced	Idress Book vients					

- Event Name Enter a name for the event.
- Message Content The SMS content to be sent when the event's date is reached. You can use template and message tags here also.
- Message Type Indicate the type of message to be sent. Options are "Normal", "8-Bit Data" and "Unicode (Chinese Text)".
- Event Status Suspend or Active. If event status is "Suspend", sms will not be sent even if the event's date is reached.
- Address Book Field Select the field of the Address Book on which the event is based. In the above example, the event is based on the "Date of Birth" field of the Address Book.
- Period Annually or Monthly. In above example, if "Annually" is selected, sms will be sent out every year on the birthday of the customer. If "Monthly" is selected, sms will be sent out on the day of the "Date of Birth" every month.
- Preferred time to SMS Indicate the preferred time of the day to send out sms. SMS will only be sent out when both the event's date and the preferred time is reached.
- Everyone in Address Book Select this option if the sms is to be sent to everyone within the Address Book.
- Selected Recipients Select this option if you only want to send event sms to selected recipients. You can use the Advanced Search Engine for selection of recipients, or simply select from a list of contacts and/or contact groups.

Chapter 5: Targeted Direct Marketing

MoCo can be used to targeted direct marketing, that is, broadcasting sms to customers who most probably are interested in your products / services.

To perform targeted direct marketing,

Step 1: From "Tools" menu, select "Send SMS" option. You can also click the E button on the toolbar alternatively.

Step 2: A dialog box as shown below will appear. Type in the message you want to send in the message box provided. The text on the left indicates the number of characters within the message. For "Normal Text" message, one SMS allows 160 characters. For "Unicode (Chinese Text)" message, one SMS allows 70 characters. If the number of characters exceeds the limit, it shall be broken into multiple SMSes before sending out.

		Ser	hd
Hecipients		Can	cel
Advanced			
Message :	This is the message I want to send.		
[35 characters]			

Step 3: Alternatively, you can select from a list of message templates by right-clicking the mouse inside the message box. A context box will appear. Move the mouse to "Insert Template" option to select a pre-defined message template.

Message :	I		~
		Undo	
		Cut	
	1	Сору	
	Lucia de la	Paste	
Message Type :	Normal Text	Delete	
		Insert Template 🔹 🕨	Test Template
		Append Template 🕨	₹.
		Insert Message Tag 🕨	

Step 4: Select the Message Type of the message you wish to send. If your message contains chinese text, you must select "Unicode (Chinese Text)" option.

Step 5: Click the "Advanced" button.

Step 6: The "Advanced Recipient Selection" dialog box will appear. In this dialog box, you can enter your search query (see chapter 3 Search Engine of MoCo User Manual), and then click "Search" button to retrieve the search result. For example as shown below, you can target your SMS recipients to be males who are between 30 to 40 years old.

Field Name		Search Type		Parameter		Search
Gender	•	Includes	•	Male	•	
Date Of Birth	•	Number of years before today	•	30-40		Clear Criteri
	•		•			
	•		•			
	•		•			
	•		•			
	-		•			
	•		•			
	•		-		×	

Step 7: Upon clicking the "Search" button, the result shall be displayed on the lower portion of the dialog box.

Name	Mobile	NRIC	User ID	Gender	
Dennis Chang	+65911	S7012345A			Select All
Foo Chee Yong	+65969	S7123436B			
Daniel Chua	+65984	S7234567C			Selected
Eric Boo	+65819	S7345678D			Contacts
Chang Cheow Joo	+65812	S7456789E			Activity in the second
Hark Loong	+65982	S7567890F			
Kahshin	+65936	S7678912G			Clear Entries
Mun Kiat	+65974	S7789123H			Antonionencercien
Wilson Chia	+65968	S7891234I			

Step 8: Click "Select All" button to select all the contacts retrieved from the search. You can also select a few of the contacts by pressing "Ctrl" key and click on their individual names, then click "Selected Contacts" button.

Step 9: Click "Send" button to send the SMS.

iend SMS			X
Recipients Advanced Message :	Dennis Chang.Foo Chee Yong.Daniel Chua.Eric Boo.Chang Cheow JooHark Loong.Kahshin.Mun Kiat.Wilson Chia; This is the message I want to send.	<	Send Cancel
(35 characters) Message Type :	Normal Text	~	

Chapter 6: Create a Marketing Campaign

MoCo's Campaign Manager allows user to create SMS campaigns such as voting, contest or survey. With Campaign Manager, you can create your own e-campaign to consolidate sms feedbacks or surveys in the form of graphical representation.

Address Book	😰 Sel	tedaler	Event Manage		Appointment Book	Auto Res	ponse System
Campaigne							
age Survey	Carpage		The second second			_	1
	Carta			1018. 			and the second
	Campag	ph Description :	Survey on your favourite (61 - Green Tea 82 - Ried Tea 83 - Cotlee 84 - Milo	Brik:			Delete Campage
	Availe	Ale Options	1			4	Update
	1	81	n	-			Carpage
	2	02	12	-		1	Des
	3	83	13.	1			- Cress
	4	84	14.	-			Ver Ver
	5	-	15.				
	- 6	-	16				
	7	9	17.				
	8		18				
			19.	1			
	10.		20		Clear All Option	0	

6.1 Add new Campaign

To add a new campaign,

Step 1: Click on button to clear Campaign information area.

Step 2: Enter campaign information into respective fields.

Campaign In	tormation —				
Campaign	Name :	Beverage	e Survey		
Campaign	Description :	Survey o B1 - Gree B2 - Red B3 - Coffe B4 - Milo	n your favounite dri en Tea Tea se	nk:	
Available	Options				
1.	B1		11.		
2.	B2		12.		
3.	B3		13.		
4.	B4		14.		
5.			15.		
6.			16.		
7.			17.		
8.			18.		
9.			19.		
10.			20.		Clear All Options

- Campaign Name Enter a name for the campaign
- Campaign Description Text description on the campaign
- Available Options Enter the acceptable code names (Eg. B1, B2, B3, B4) for the campaign. Each code name represent a particular selection, in this case for the Beverage Survey, B1 represent Green Tea, B2 represent Red Tea, etc.

Step 3: Click on Step 3: Click on

When a campaign is created successfully, the campaign name will appear on the List of Campaigns box.

6.2 Delete Campaign

To delete a campaign,

Step 1: From the List of Campaigns box, select the campaign to be deleted by clicking on the campaign name. A blue highlight will appear.

Step 2: Click on Campaign to delete the highlighted campaign.

6.3 Updating Campaign

To update an campaign,

Step 1: Select the campaign to be updated from the List of Campaigns box.

Step 2: Replace the information to be updated.

Step 3: Click on Campaign to save the changed information.

6.4 How it Works

6.4.1 Create an ARS Rule

After you have created a campaign using the Campaign Manager, the next thing to do is to create a rule for that campaign using the *Automatic Response System*.

Ule Name : Beverage Survey Condition Sender Sender Advanced H#ALL## Advanced Bev Begins with Bev Ends with Contains Contains Action Type : Action Type : Action Type : Contains Beverage Survey Contains Structown Beverage Survey Beverage Survey Beverage Survey Beverage Survey	lules Information	
Condition Sender Sender Advanced H#4LL## Advanced H#4LL## Advanced Bev Begins with Bev Contains Contains Contains Action Parameters Control Stemal Application Export to Text Document SMS Subscription Reginer Contact Continut Control Text Document SMS Subscription Reginer Contact Control Control Contact Control Contr	Rule Name : Beverage Survery	
Sender Sender Advanced Bev Begins with Bev Canobian Contains Contains Action Parameters Canobian Name: Beverage Survey Action Parameters Canobian Name: Beverage Survey Canobian Name: Beverage Survey Canobian Name: Beverage Survey Canobian Name: Can	- Condition	
Sender ##ALL## Advanced ##ALL## Message Pattern Begins with Bev Ends weth Contains Action Action Parameters Contains Action Type : Automatic Structown Campaign Name: Brows to selected Recipients Campaign Name: Brows to selected Recipients Campaign Name: Proved to Studement Beverage Survey SMS Vole/Context Survey Priormation Reterval	Sandar	
Advanced Advanced Message Pattern Begins with Contains Action Type : Action Parameters Action Parameters Action Parameters Campaign Name: Beverage Survey Action Parameters Campaign Name: Beverage Survey Forward to Setted Recipierts Forward to Sett		
Advanced Message Pattern Bey Begins with Contains Action Type: Action Type: Action Parameters Campaigin Name: Provoke External Application Export to Text Document SNS Valcoment Continuent SNS Valcoment Sursey Information Retrieval	Sender ##ALL##	<u>≙</u>
Action Parameters Action Type: Action Parameters Campaign Name: Beverage Survey Action Parameters Action Parameters Action Parameters Beverage Survey Beverage Survey	Advanced	
Mesage Pattern	Advanceu	✓
Mesaga Pattern Begins with Contains Action Action Action Type: Action Parameters Action Parameters Action Parameters Action Parameters Action Parameters Action Parameters Beverage Survey Beverage Survey Inducted Contact Commit Cancel Application Beverage Survey Information Retrieval		
Begine with Bev Beyre with Bev Ends with Contains Contains Contains Action Type: Auto Reply to Sender Forward to selected Recipients Provice External Application Automatic Struktown Export to Text Document SNS Vide/Conteal Survey Formation Retrieval	Message Pattern	
	Begins with Bev	
Contains Contains Contains Action Action Action Action Forward to selected Recipients Forward to selected Recipients Forward to selected Recipients Provide External Application Export to Text Document SMS Subscription Feguite Contact Commit Cancel Appointment SMS Volt-Contact Susrey Information Retrieval		
Contains Action Action Action Type: Action Parameters Forward to selected Recipients Forward to selected Recipients Forward to selected Recipients Recipient Contact Commit Cancel Appointment SMS Vold Contact Suscerey Information Retrieval	Linds with	
Action Action Type: Action Type: Action Parameters Campaign Name: Beverage Survey Beverage Survey Statistication Control Contr	Contains	
Action Action Type: Action Parameters Campaign Name: Campaign Name: Beverage Survey Beverage Survey Subscription Paragiste Contact Confirm/Cancel Appointment SMS Vabscription Parameters Action Parameters Beverage Survey Subscription Subscription Subscription Subscription Subscription Subscription Action Parameters Action Parameters Action Parameters Action Parameters Campaign Name: Subscription Beverage Survey Subscription Subscription Subscription Subscription Subscription Campaign Action Parameters Beverage Survey Subscription Beverage Survey Subscription Subscript		
Action Type : Action Type : Action Parameters Forward to selected Recipients Provice External Application Export to Text Document SMS Subscription Register Cortact Common Cancel Appointment SMS Ved Appointment SMS SMS SMS SMS SMS SMS SMS SMS SMS SMS		
Action Type : Action Parameters Forward to selected Recipients Forward to selected Recipients Beverage Survey Register Contact Continue Canact Continue Canact SMS Vold/Content/Survey Fordomation Retrieval	Action	
Auto Reyby to Sender Campaign Name: Forward to selected Recipients Campaign Name: Provice External Application Beverage Survey Export to Text Document Shutdown Register Contact Confirm Varved Appointment OSKSV426/Context/Survey Information Retrieval	Action Type :	Action Parameters
Forward to selected Recipients Canagign Name: Imvoke External Application Beverage Survey Export to Text Document Subscription Confirm/Cancel Appointment Subscription Oxform/Cancel Appointment Subscription Information Retrieval Export to text Document	Auto Reply to Sender	
Invoke External Application Automatic Studiown Export to Text Document SMS Subscription Register Contact Continut Cancel Appointment SMS Volk-Content Susrey Information Retrieval	Forward to selected Recipients	Campaign Name:
Euronalis Shutowin Export to Text Document SMS Subscription Register Contact Confirm/Cancel Appointment VSMSV36/Context/Survey Information Retrieval	Invoke External Application	Beverage Survey
Content Careet Appointment Content/Careet Appointment StatsVate/Content/Survey Information Retrieval	_Automatic Shutdown	
Pegister Contact Continut Cancel Appointment With Volume Vo Volume Volume Volu	SMS Subscription	
□Confim/Cancel Appointment ▼SMS Vote/Context/Survey □Information Retrieval	Register Contact	
SMS Vote/Contest/Survey	Confirm/Cancel Appointment	
Information Retrieval	✓SMS Vate/Contest/Survey	
	Information Retrieval	

Following the example on the Beverage Survey, you can now go to the Automatic Response System page and create a new rule called "Beverage Survey" (or any other name you prefer).

Select "All" for the sender condition and "Begin with: Bev" as the message pattern condition, as shown in above screen shot.

Select the "SMS Vote/Contest/Survey" action and key in "Beverage Survey" as the campaign name. Once all these information is keyed in, you can add the new rule to the system.

6.4.2 Wait for incoming SMS

Once you have created the campaign and its corresponding rule, the only thing you need to do is to wait for incoming sms.

For example, the following message content would be considered as a valid vote for this campaign: *"Bev B2"*

When MoCo received the above-mentioned sms, it would consider it as a valid vote for the campaign "Beverage Survey", as a vote towards the option "Red Tea".

6.4.3 View Campaign Result

To view the result of a particular campaign,

Step 1: Select the campaign from the List of Campaigns box.

Step 2: Click on *Step 2*: Click of the campaign.

Step 3: A dialog box will appear, displaying the result of the campaign.



The top portion of the dialog box will show the graphical representation of the campaign result. The lower portion will show the detailed information of each votes.

Under the "Detailed Information", a context box will appear if you right-click the mouse on any of the vote:

ption Name	Voter	Received	Validity	Message	
Flag as Val Flag as Inv	+6591 d alid	March 20, 2007 15:29:41 March 20, 2007 15:30:20 March 20, 2007 15:30:44 March 20, 2007 15:30:47	Valid Valid Valid Valid	Bev b2 Bev b3 Bev b1 Bev b2	
ummary Inform Option Name	ation	stal Vote	🗐 Ignore o	luplicated votes	Save Information to File
B1 B2					

- Flag as Valid Select this option to flag this particular vote as a valid vote.
- Flag as Invalid Select this option to flag this particular vote as an invalid vote.

The option "Ignore duplicated votes" can be used to ignore multiple votes on the same item from the same mobile phone number. This option is useful if one wishes to implement a one-man-one-vote system.

Result						
82 33.3	Ca	ngalgn Name: Beverage S	81 		Campa G Campa Surve dink B B S- B B - Campa Camp	Option Pie Chart Bie Chart Bie Chart Bie Chart Bie Chart Gener Tea Coffee Sto Wo Sto
etailed Informatio Option Name B2 B3 B2 -Summary Inform Option Name	on Voter +6591 +6591 +6591 nation	Pacelived Mech 20, 2007 15-29-41 Mech 20, 2007 15-30-20 Mech 20, 2007 15-30-44 Mech 20, 2007 15-30-47 Mech 20, 2007 15-30-47	Valdty Vald Vald Vald Vald Vald Vald	Message Bev 52 Dev 53 Bev 53 Bev 53 Bev 53 Bev 53 Bev 53		Seve Information

To save the campaign result to a file, click the "Save Information to File" button.

6.4.4 Making use of Campaign Result

- Detailed John

Option Name	Voter	Received	Validity	Message	
2	+6591	March 20, 2007 15:29:41	Valid	Bev b2	
3	+6591	March 20, 2007 15:30:20	Valid	Bev b3	
1	+6591	March 20, 2007 15:30:44	Valid	Bev b1	
2	+6591	March 20, 2007 15:30:47	Valid	Bev b2	
Summary Inform	nation	ital Vote	🔽 Ignore d	uplicated votes	Save Information to File
Option Name	nation	ital Vote	Ignore d	uplicated votes	Save Information to File
Option Name B1 F Send SM	nation	ital Vote	🔽 Ignore d	uplicated votes	Save Information to File
Option Name B1 E Send SM E Select W	nation To 1 S to All 1 Inner 0	ital Vote	Ir Ignore d	uplicated votes	Save Information to File
Option Name B1 E Send SM E Select W	nation To 1 S to All 1 Inner 0	tal Vote	I Ignore d	uplicated votes	Save Information to File

Under "Summary Information", you can right-click the mouse on any option name and a context box will appear.

• Send SMS to All

Send SMS to All	×
Recipients	Message Thanke for participating. As your vote is the most popular choice, you are entitled to a free gift. Please collect the free gift at any of our counters.]
	[152 characters] Message Type : Normal Text Send Cancel

A dialog box as shown above will appear for you to send SMS to all the voters who have selected the option.

• Select Winner

Select Winner	
List of Mobile Numbers +6591111222 +659111222 +659444333 +659555666	Number of Winners : 1 Pick Winner Winners Winners Nobile Number Footion Send SMS to Winners Congratulations I You are the winner for our beverage survey.
	[61 characters] Message Type : Normal Text
	Send SMS to Winners Save Result Close

A dialog box as shown above will appear for you to select winner(s) from a list of voters who selected the option.

Simply enter the number of winners and click "Pick Winner" button to randomly select a winner(s).

Upon selecting the winner, you can also send a message to the winner(s) by keying in the message and then clicking the "Send SMS to Winners" button.

Chapter 7: Other Features

7.1 Label Printing

MoCo allows user to perform label printing on standard label type 1029.

To perform label printing, select "Print Label" from the File menu. A dialog box as shown below will appear.

Print Label		×
Select Contact :	Dennis Chang	•
Type of Label :	Label No. 1029 💌	ОК
Position in Label		Cancel
 Left 		
C Right		

Step 1: Select the contact who you wish to print the label of.

Step 2: Make sure the type of label is "Label No. 1029".

Step 3: Select the position within label for printing. Click "OK". The below Print dialog box will appear.

Print		<u>? ×</u>
Printer-		
Name:	Canon MP700 Printer	Properties
Status:	Ready	
Type:	Canon MP700 Printer	
Where:	USB002	
Commer	nt:	Print to file
Print rang	ge	Copies
• All		Number of copies: 1
C Pag	es from: 1 to: 1	
C Sele	ection	11 22 33
Hele		OK Canad
Help		UN Cancel

Step 4: Select the appropriate printer name. Click "Properties" button to set the paper size.

🗳 Canon MP700 Printer Propertie	s		?
😂 Main 🥯 Page Setup 🙆 St	amp/Background 🥪 Ef	ffects 🔐 Profiles 👪 Maintenance	
	🖳 Page Size:	A5	•
	♣ Orientation:	A C Portrait A C Landscape	
	🚢 Printer Paper Size	: Same as Page Size	-
	Printing Type:	Normal-size Printing	•
	Borderless Printin Amount of Exte	ng msion: 🏋 ———————————————————————————————————	Q
A5 Normal-size Printing	Duplex Printing Staple Side:	€ Long-side stapling C Short-side stapling	
	Copies:	1 (1-999)	
	- 	Reverse Order	
		Defaults	
		OK Cancel Help	

Step 5: A dialog box as shown above will appear. Note that for different printer, a different kind of dialog will appear.

Step 6: Go to Page Setup and set the Page Size to "A5".

Step 7: Click "OK". You will return to the previous Print dialog box.

Step 8: Click "OK" to proceed with the printing.

7.2 Receipt Printing

MoCo allows user to perform receipt printing on 'A5' size paper.

To perform receipt printing, select "Print Receipt" from the File menu. A dialog box as shown below will appear.

X		Print Receipt
	REF00000001	Reference Number :
	Cancel	ОК
	Cancel	Reference Number :

Step 1: Enter the reference number of the account you want to print.

Step 2: Click "OK". The below Print dialog box will appear.

Print	<u>? ×</u>
Printer	
Name: Canon MP700	Printer Properties
Status: Ready	
Type: Canon MP700 F	Printer
Where: USB002	
Comment:	Print to file
Print range	Copies
• All	Number of copies: 1
C Pages from 1	to: 1
C Selection	
нер	UK Cancel

Step 3: Select the appropriate printer name. Click "Properties" button to set the paper size.

🐝 Canon MP700 Printer Properties	•	<u>? ×</u>
😂 Main 🦃 Page Setup 🙆 Sta	amp/Background 🛛 🥪 Effe	cts 📴 Profiles 🛛 👪 Maintenance 🛛
	🜉 Page Size:	A5
	↓ Orientation: A	Portrait 🔺 C Landscape
	🐣 Printer Paper Size:	Same as Page Size
	Printing Type:	Normal-size Printing
	Borderless Printing Amount of Extensi	on: 🕱 🛄 🚺
A5 Normal-size Printing	Duplex Printing Staple Side:	Long-side stapling C Short-side stapling
	Copies:	1
	1	☐ Reverse Order ☑ Collate
		Defaults
		OK Cancel Help

Step 4: A dialog box as shown above will appear. Note that for different printer, a different kind of dialog will appear.

Step 5: Go to Page Setup and set the Page Size to "A5".

Step 6: Click "OK". You will return to the previous Print dialog box.

Step 7: Click "OK" to proceed with the printing.

7.3 Accounts System

MoCo has a built-in Accounts System for user to perform some simple accounting tasks.

To invoke the Accounts System, select "Accounts System" from the Tools menu. A dialog box as shown below will appear.

Diselas O-Mara						
Jisplay Options	Ref. No.	Date	Client Name	Туре	Description	Amt Pai
Today's Transaction	REF00000004	August 07, 2007 13:32:10	Peter Tan	Products	Something ABC	25.00
C Current Month's Transaction	REF0000004	August 07, 2007 13:32:10 August 07, 2007 13:32:10	Peter Tan	Services	Consultation A	30.00
C Customized Period	REF00000004	August 07, 2007 13:32:10	Peter Tan	Services	Consultation B	50.00
From: 8/ 7/2007						
To: 8/ 7/2007 💌						
Other Options						
Payment Type :						
Account Type :						
Account Type : Products, Services	<					8
Account Type : Products, Services	Morning Balance:	: 0.00 Aft	ernoon Balance: 🏾	140.00		0.00
Account Type : Products, Services	Morning Balance:	: 0.00 Aft	ernoon Balance:	140.00	Night Balance:	0.00

7.3.1 Add New Transaction

Step 1: Click "Add New Transaction" button. A dialog boz as shown below will appear.

	nrormation					
Referenc	e No. :	REF0000005	Assistant Name :	Eddy		
Client / S	upplier :	John Chan	Remarks :		~	
Payment	Type :	Cash	-		~	
			Last Modified :			
				<i>'</i>		
Туре	Desc	ription			Amount Paid	Ī
Products	ABC				50	
Services	💌 Туре	e XYZ			100	
	-				-	
					-	
	÷					
	-					
	-					1
	-					1
	•					1

Step 2: Key in the accounts information. For expenses, you can add a minus sign in front of the Amount Paid value.

Step 3: Click "Save" button to add the account.

7.3.2 Manage existing account items

Ref. No.	Date	Client Name	Туре	Description	Amt Paid
REF00000004 REF00000004	August 07, 2007 13:32:10 August 07, 2007 13:32:10	Peter Tan Peter Tan	Products Products	Something ABC Something DEF	25.00 35.00
REF00000004 REF00000004	Modify 3:32:10 Delete	Peter Tan Peter Tan	Services Services	Consultation A Consultation B	30.00 50.00
-	Print Receipt				

To manage existing account item, right-click on the item and a context menu will appear for the following options:

- Modify Select this option to modify the information of the account item.
- Delete Select this option to delete the account item.
- Print Receipt Select this option to print receipt for this account item. Remember to set the paper size as 'A5'.

7.3.3 Query Account System

Current Month's Transactic Customized Period From: 8/ 7/2007 To: 8/ 7/2007 Other Options	on
Customized Period From: 8/ 7/2007 To: 8/ 7/2007 Other Options	
From: 8/ 7/2007 To: 8/ 7/2007 Other Options	-
To: 8/ 7/2007 Other Options	
Other Options	Ŧ
Payment Type :	
All	-
Account Type :	
Products, Services	-

At the Display Options, select the query parameters and click "Search" button. The list of account items that satisfy the query parameters will be displayed, together with the calculated balances.

7.3.4 Accounts Settings

Settings				×
Morning Timings :	12:00 AM	• to	11:59 AM	•
Afternoon Timings :	12:00 PM	÷ to	05:59 PM	•
Night Timings :	06:00 PM	• to	11:59 PM	•
	Save	Cancel		

By clicking the Setttings button on the Accounts System dialog box, the above dialog box will appear. You can set the individual timings and click Save button. The timings shall affect the calculations of individual balances.

7.3.5 Save Accounts Sheet

By clicking the "Save Account Sheet" button on the Accounts System dialog box, you can save the currently displayed account sheet to a HTML file.