MoCo™ SMS Suite

Quick Guide for SMS Appointment Reminder System

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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 SMS Appointment Reminders.

1.2 Target Audience

The target audiences of this document are all customers who will be using MoCo for performing SMS Appointment Reminders. This includes educational centres, travel agencies, clubs/ associations/ societies, dental/specialist clinics, bridal studios, car serving centres, etc.

Chapter 2: Client Database Management

2.1 Import existing customer database

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

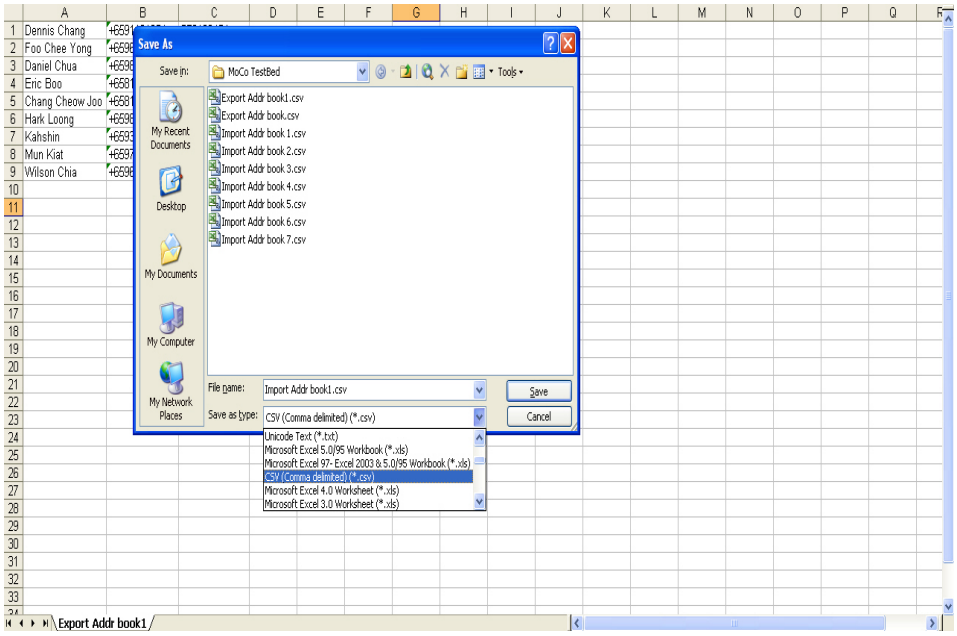
2.1.1 Prepare Import File (csv/txt) from existing database

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

Step 1: Open your customer database spreadsheet using MS Excel.

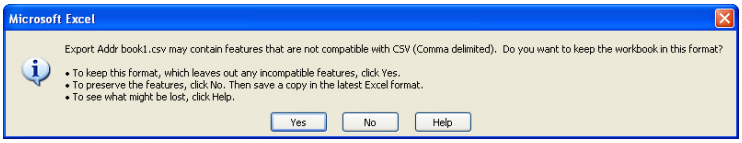
Step 2: From the File menu, select "Save As …" option.

Step 3: A "Save As" dialog box will appear.



Step 4: 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 5: Click "Save" button. The below warning box may appear. Just click "Yes" button.



Step 6: The csv / txt file is saved successfully. Close the MS Excel application.

2.1.2 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:

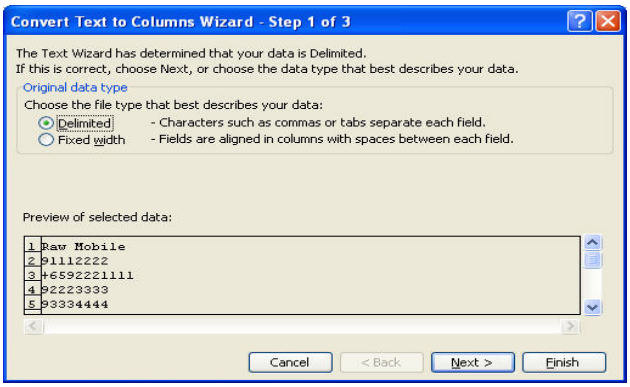
	A	B	C	D	E	F
1	Name	Raw Mobile	Address	DOB	Gender	Group
2	Chee Yong	91112222	Blk 23 Potong Pasir #04-08	11/14/1975	Male	Member
3	CSL	+6592221111	123 Eunos Road	1/20/1972	Male	Non-member
4	Dennis	92223333	Blk 3 Geylang Road #01-234.	11/12/1975	Male	Member

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

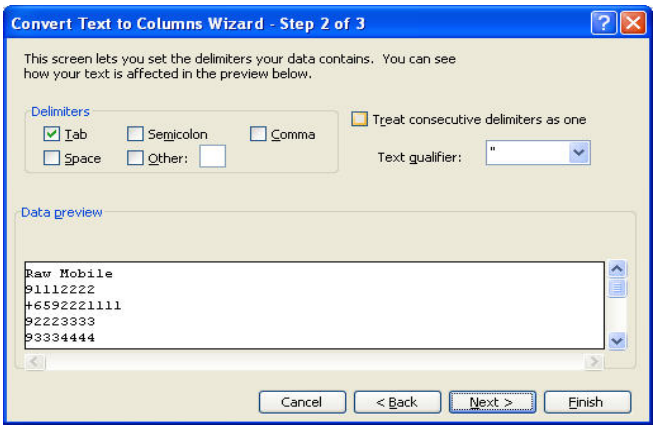
2a. Highlight the column (in this case, column B) to be converted.

2b. Select from menu, “Data -> Text to Columns …” option.

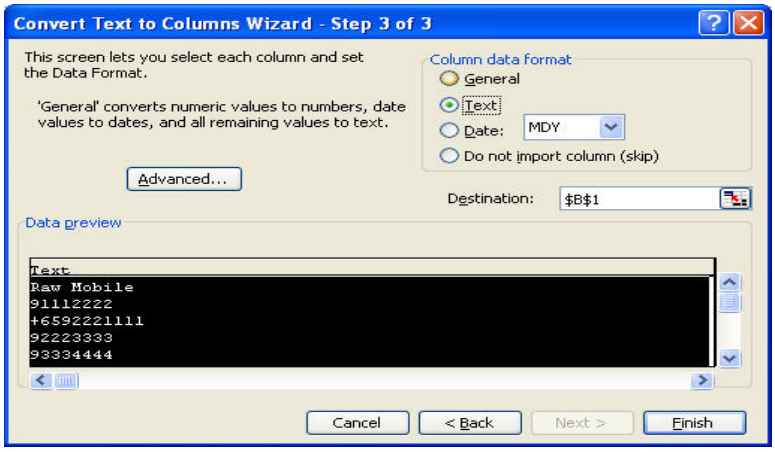
2c. The dialog box shown below will be displayed. Click the “Next” button.



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



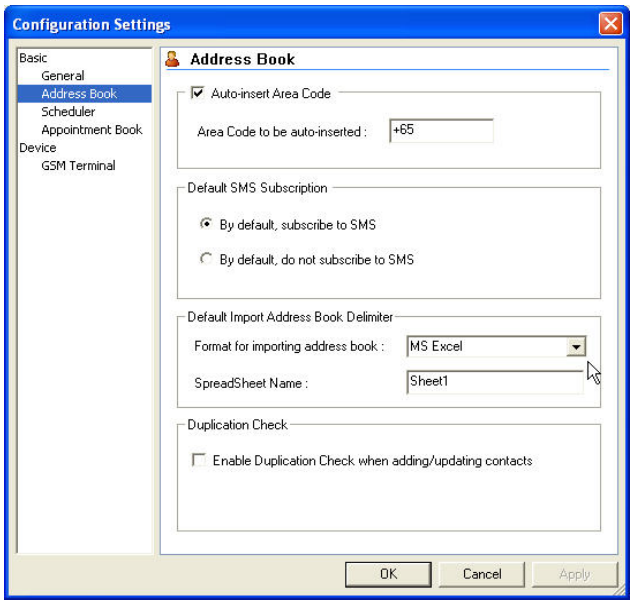
2e. The dialog box shown below will be displayed. Select “Text” and click “Finish” button.



2.1.3 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.



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.

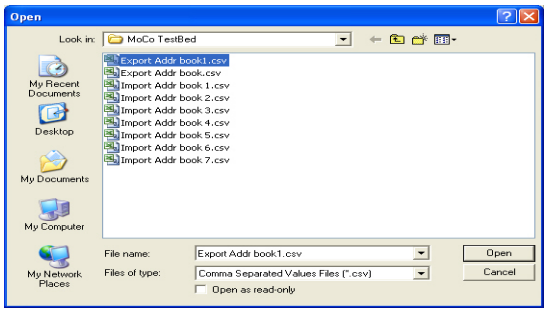
Step 3: Click “OK” button.

2.1.4 Import csv/txt file into MoCo

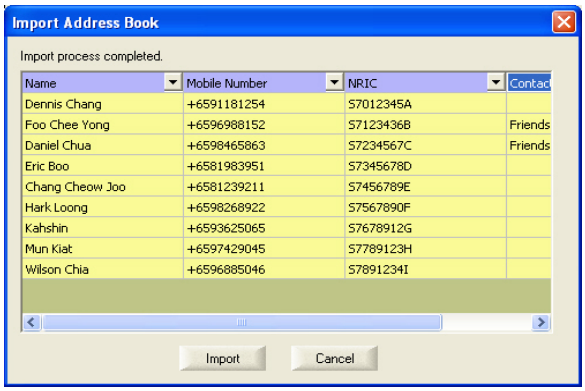
To import from csv file into address book,

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

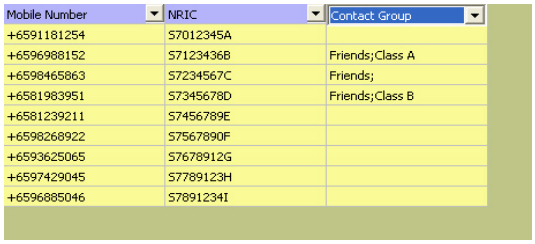
Step 2: From the **Open** dialog box, select the csv or txt file to import into the database. Click “Open” button.



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.



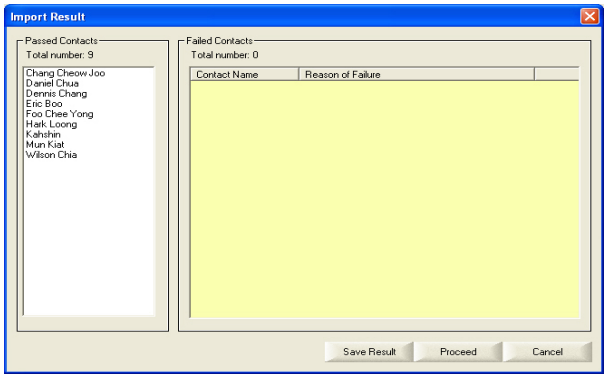
Step 4: If one of the column of your database contains the name of the contact group, you can select the option “Contact Group” for that column. For contacts who are members of multiple contact groups, the contact group names are separated by semicolons within the column.



Mobile Number	NRIC	Contact Group
+6591181254	S7012345A	
+6596988152	S7123436B	Friends;Class A
+6598465863	S7234567C	Friends;
+6581983951	S7345678D	Friends;Class B
+6581239211	S7456789E	
+6598268922	S7567890F	
+6593625065	S7678912G	
+6597429045	S7789123H	
+6596885046	S7891234I	

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.



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.

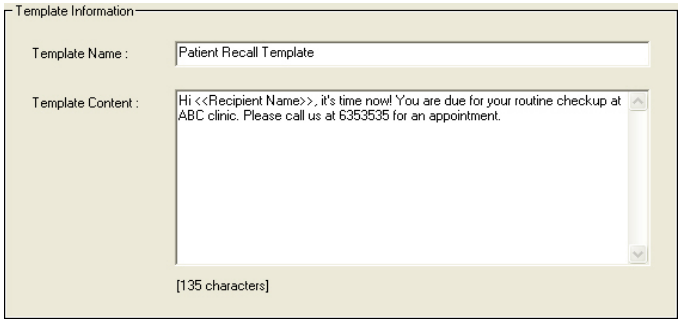
Chapter 3: Create Message Templates

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 create new templates,

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

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

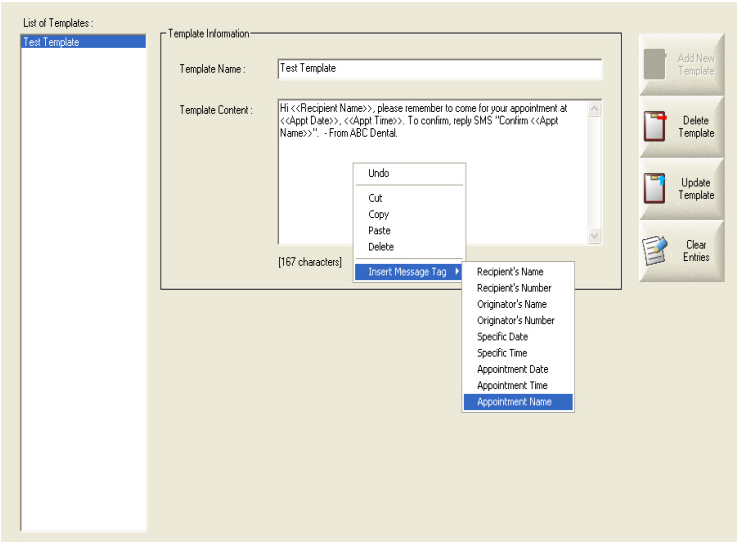


Step 3: Click on to save template.

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.



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: Regular customer callback

MoCo can be used to perform regular customer callback by sending sms to existing customers on products which they may be interested.

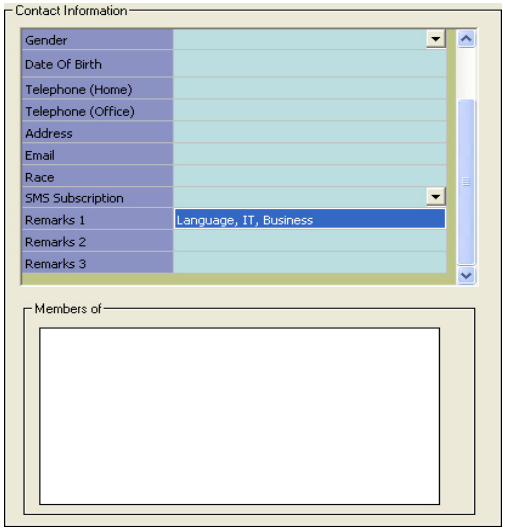
Taking a private educational centre as an example, a student who had taken a Korean language course may be interested in other upcoming language courses that the centre offers.

4.1 Update customer's information

Taking the example of the educational centre, to perform effective customer recall, you need to keep the MoCo Address Book updated.

Step 1: Select the customer to be updated from the List of Contacts.

Step 2: Key in the preferences of the customer in the "Remarks 1" field provided.



Step 3: Click on to save the changed information.

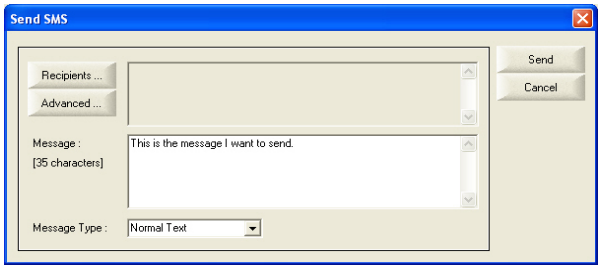
4.2 Perform customer recall

Patient recall can be performed as and when you have a new product or service or course that you want to introduce to existing customer. The key to performing customer recall is targeted advertising, that is, sending out sms that contain information that may be of interest to them.

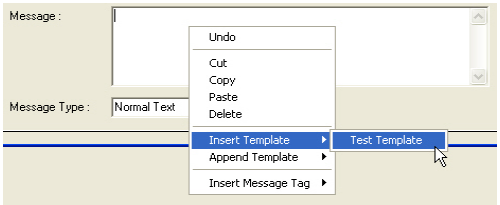
To perform customer recall,

Step 1: From "Tools" menu, select "Send SMS" option. You can also click the 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.



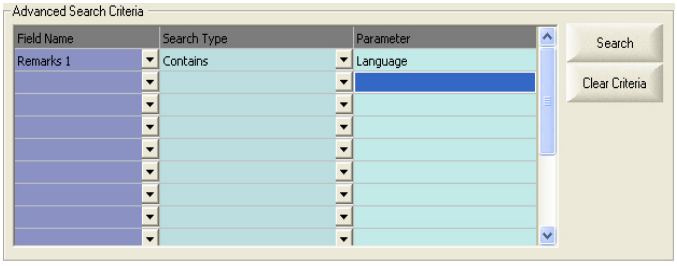
Step 3: Alternatively, you can select from a list of message templates by right-clicking the mouse inside the message box. A context box will appear. Move the mouse to “Insert Template” option to select a pre-defined message template.



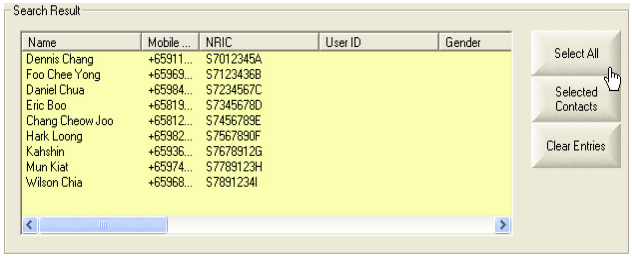
Step 4: Select the Message Type of the message you wish to send. If your message contains chinese text, you must select “Unicode (Chinese Text)” option.

Step 5: Click the “Advanced” button.

Step 6: The “Advanced Recipient Selection” dialog box will appear. You can select your criteria and perform a search to retrieve the relevant customers’ information.

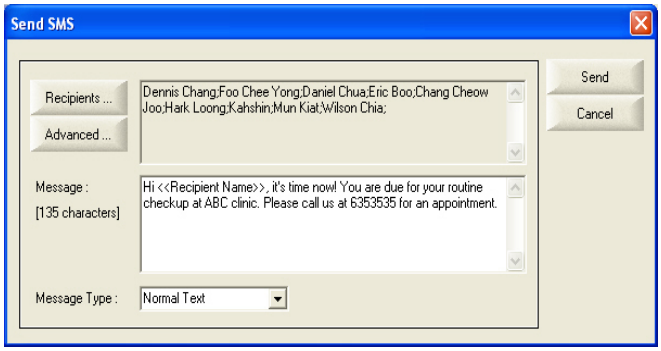


Step 7: Upon clicking the “Search” button, the result shall be displayed on the lower portion of the dialog box.



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.

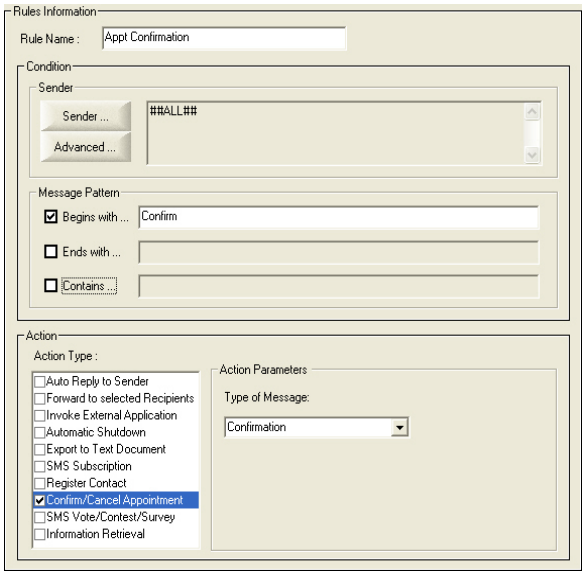

Send SMS
Recipients ...
Advanced ...
Dennis Chang;Foo Chee Yong;Daniel Chua;Eric Boo;Chang Cheow Joo;Hark Loong;Kahshin;Mun Kiat;Wilson Chia;
Send
Cancel
Message :
[135 characters]
Hi <<Recipient Name>>, it's time now! You are due for your routine checkup at ABC clinic. Please call us at 6353535 for an appointment.
Message Type :
Normal Text

Chapter 5: Appointment Management

5.1 Setting up Auto Appt Confirmation

To set up MoCo for Automatic Appointment Confimation,

Step 1: At ***Auto Response System*** page, create a new rule:



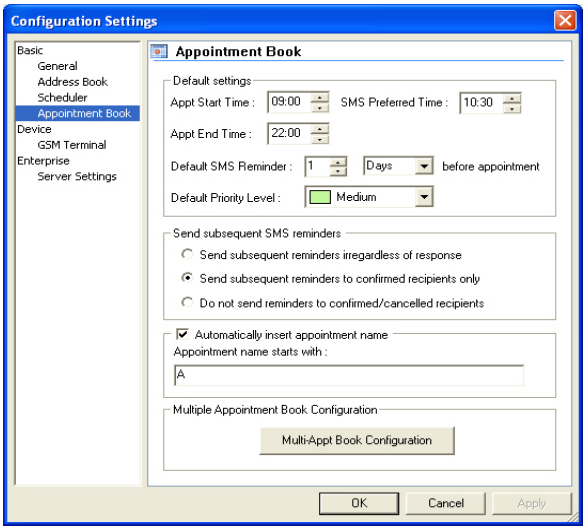
Set the sender condition to “All”, and message pattern to “Begin with: Confirm”.

Select the “Confirm/Cancel Appointment” action, with type of message set to “Confirmation”.

Click “Add New Rule” button to add the new rule.

5.2 Configure Appointment Book settings

To access the Configuration Settings dialog, click on the icon on the toolbar or select Configuration Settings from the Tools menu.



On the Appointment Book configuration page, users can configure the following default parameters:

- Default Settings

User can set the default values of :

  - Appointment Start / End Time
  - Preferred time to SMS
  - Date for SMS Reminder
  - Priority level

- Send Subsequent SMS Reminders

User can determine how MoCo handle subsequent SMS reminders:

  - Send subsequent reminders irregardless of response – Subsequent SMS reminders shall be sent out no matter the recipients reply back or not

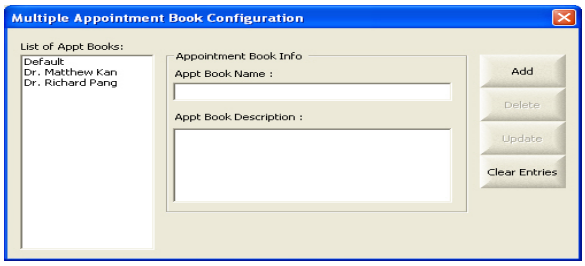
  - Send subsequent reminders to confirmed recipients only – Subsequent SMS reminders shall only be sent out if the recipients confirmed their appointments (either manually or automatically)

  - Do not send reminders to confirmed / cancelled recipients – Subsequent SMS reminders shall not be sent out if the recipients has confirmed or cancelled their appointments (either manually or automatically)

- Automatically insert appointment name

Upon creation of new appointment in the MoCo's Appointment Book, an appointment name has to be given. To auto fill the appointment name, check the box "Automatically Insert Appointment Name" and type the name given to each appointment. MoCo will use this name and append a running number at the end to make each appointment name unique.

- Multiple Appointment Book Configuration



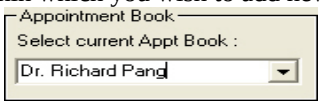
By clicking the "Multi-Appt Book Configuration" button, the above dialog box will appear for you to add / delete / update appointment books.

5.3 Adding, Deleting and Updating Appointment

5.3.1 Add new Appointment

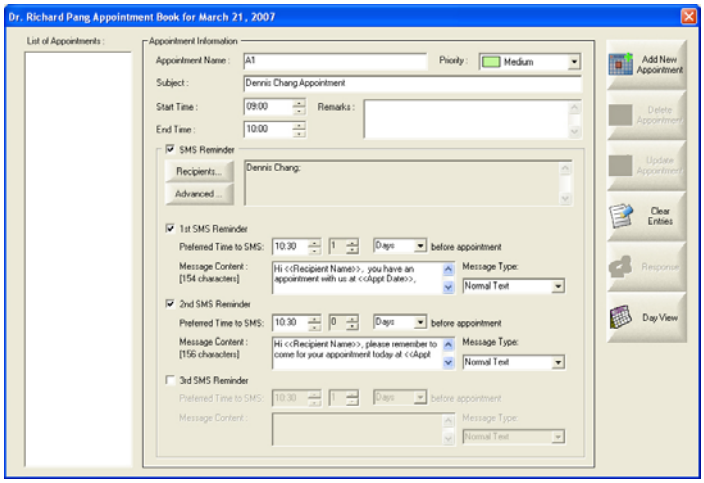
To add a new appointment,

Step 1: Select the Appointment Book within which you wish to add new appointment.



Step 2: Double click on the screen calendar date that you want to create the appointment. A dialog box for adding new appointment will appear.

Step 3: Enter information for the appointment.



- Appointment Name - Appointment name will be used to confirm appointment when recipient reply with SMS message.If the Config Setting for Automatically Insert Appointment Name is set, the appointment name will be auto filled by MoCo.
- Priority – You can select from low, medium, high and very high. This is only a color highlight for the appointment subject when you look at the main calendar.
- Subject – A brief description of the appointment. The subject text will be displayed on the main calendar.
- Start / End Time – The appointment start and end time. Note that the appointment start time can be automatically inserted into the SMS content using message tag <<Appt Time>>.
- Remarks – Additional (optional) remarks.
- SMS Reminder – Click this checkbox to enable sending of SMS reminder.
- Recipients/Advanced – Select the recipients for the appointment reminder SMS. You can select from a list of contacts/contact groups (using Recipient button), or via querying the Address Book (using Advanced button).
- 1st/2nd/3rd SMS Reminder – Click this checkbox to enable sending of first/second/third SMS reminder.
- Preferred time to SMS – The preferred time to send out reminder SMS. You can set the number of days/weeks before the actual appointment date to send the reminder sms.
- Message Type – Select from Normal Text, 8-Bit Data and Unicode (Chinese Text). For normal english sms, choose Normal Text. For content containing chinese text, choose Unicode.
- Message Content – Actual message content to be sent. You can insert template or type in directly.

Step 4: Click on

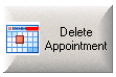
to create appointment.

When an appointment is created successfully, the appointment's start date, end date and subject will appear on the main calendar.

5.3.2 Delete Appointment

To delete an appointment,

Step 1: From the calender view, double click on the appointment entry to be deleted. Alternatively, from the Appointment dialog, select the appointment to delete from List of Appointments.

Step 2: Click on 

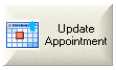
to delete the highlight appointment.

5.3.3 Updating Appointment

To update an appointment,

Step 1: From the calender view, double click on the appointment entry to be updated. Alternatively, from the Appointment dialog, select the appointment to update from List of Appointments.

Step 2: Replace the information to be updated.

Step 3: Click on 

to save the changed information.

5.3.4 Changing Appointment Date

To change an appointment,

Step 1: From the calender view, double click on the appointment entry to be updated. Alternatively, from the Appointment dialog, select the appointment you wish to change date of from the List of Appointments.

Step 2: Click on

to change the appointment's date.

Step 3: A dialog box shown below will appear. Enter the new Appointment Book name, Appointment Date, Appointment Start and End Time. Then click "Ok".

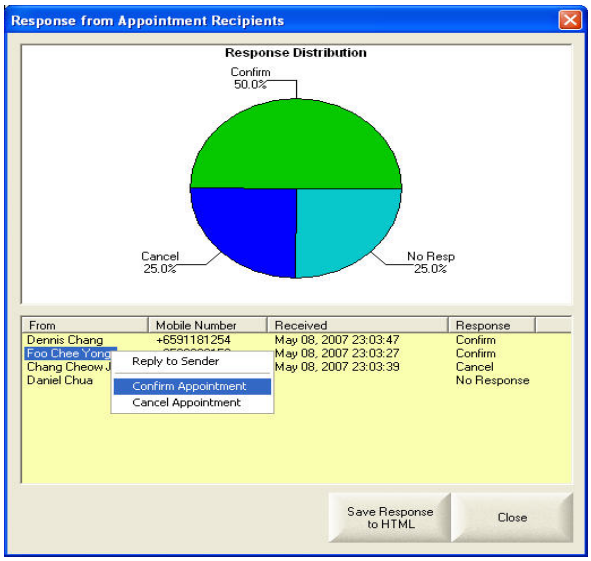
5.4 Check Response

To check a confirmation response,

Step 1: Double click on the appointment.

Step 2: Click on

to open the response dialog. Check under the Response column for result.

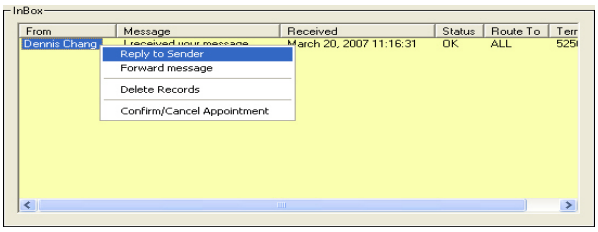


Upon right-clicking on the appointment recipient's name, a context box appear displaying the following options:

- Reply to Sender – Select this option to invoke a dialog box for you to send sms reply to the sender.
- Confirm Appointment – Do a ***manual appointment confirmation***. This option is useful if the customer confirm his appointment via phone call or other means instead of sms.
- Cancel Appointment – Do a ***manual appointment cancellation***. This option is useful if the customer cancel his appointment via phone call or other means instead of sms.

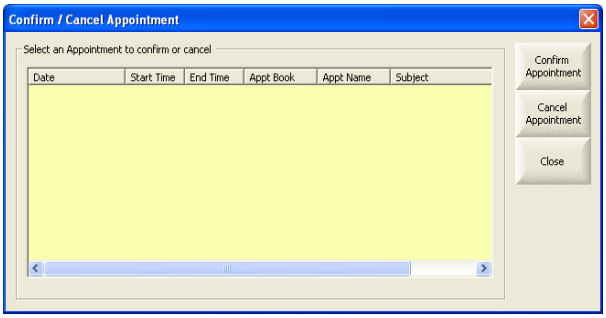
To save the response information into a HTML report, just click "Save Response to HTML" button.

5.4.1 Do manual Appt Confirmation at Transaction Manager



The following options are available when you right-click on any records in the Transaction Manager InBox:

- Reply to Sender – A dialog box will appear for you to send reply to the selected sender.
- Forward message – A dialog box will appear for you to forward the message to other recipients.
- Delete Records – Use this option to delete one or more records. Alternatively, you can use the "Delete" key to perform deletion.
- Confirm / Cancel Appointment – A dialog box will appear, displaying a list of appointments of the sender.



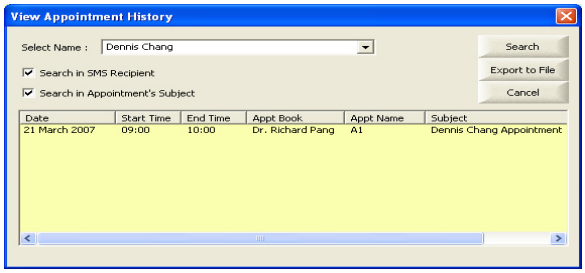
To confirm/cancel any appointment, just click on the item and then click “Confirm Appointment” or “Cancel Appointment” buttons. This feature is useful in updating the Appointment Book when customers make appointment confirmation via phone call rather than sms.

5.5 View Appointment History

Step 1: Click on

. A dialog box will appear for you to view appointment history.

Step 2: Select the name of the contact. Click the **Search** button.

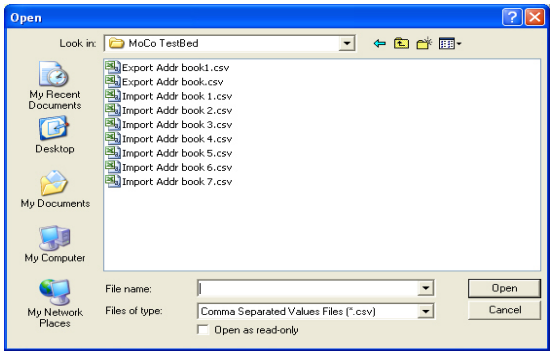


Step 3: To save the appointment history to file, click “Export to File” button.

5.6 Import Appointment List

Step 1: Click the

. An Open File dialog box will appear for you to load to Appointment list file. MoCo expects a csv (comma-separated-values) file for importing appointment.

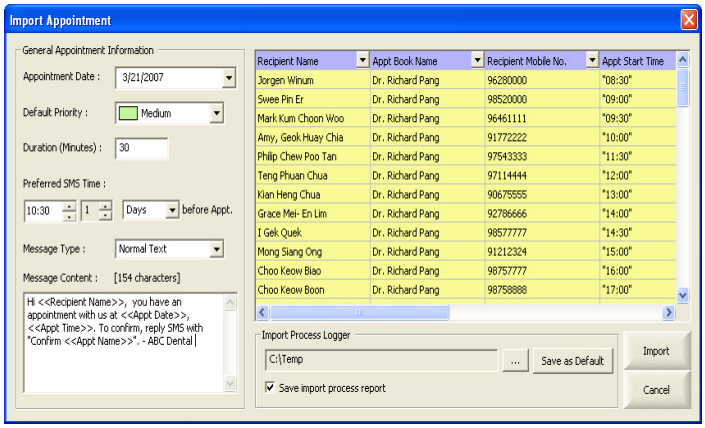


A typical Appointment Import file (*.csv) should contain the following fields (not in any order):

- Customer Name
- Customer Mobile Number
- Appointment Start Time (in 24-hour format HH:MM)
- Appointment Book Name (Optional)
- Appointment Duration in minutes (Optional)

All records within a single Appointment Import file should belong to the same appointment date. Each of these fields shall be separated by a comma, and each record separated by a carriage return.

Step 2: Upon selecting the Appointment Import file (*.csv), a dialog box as shown below will appear, displaying all the columns within the import file.



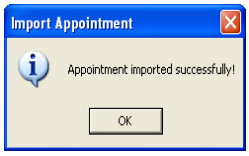
Step 3: Select the field names (Eg. Recipient Name, Appt. Book Name, etc) for the columns that you wish to import.

Step 4: At the "General Appointment Information" portion on the left, enter the following information:

- Appointment Date – The appointment date for the appointments to be imported.
- Default Priority – Priority level of the appointments to be imported. You can use the default value.
- Duration – The appointment duration in minutes. If your appointment import file does not contain any information on appointment duration, you can set a standard duration here for all the appointments to be imported.
- Preferred SMS Time – The time and number of days/weeks before appointment which you wish to send out SMS.
- Message Type – Select from Normal Text, 8-Bit Data or Unicode (Chinese Text). For normal english content, use Normal Text. If content contains chinese characters, use Unicode.
- Message Content – The actual message content to be send out via SMS. You can insert template here or key in the text directly.

Step 5: Under the "Import Process Logger" portion, you can save a report of the import process of checking "Save import process report" checkbox. You can also specify the folder which you wish to save the import process report.

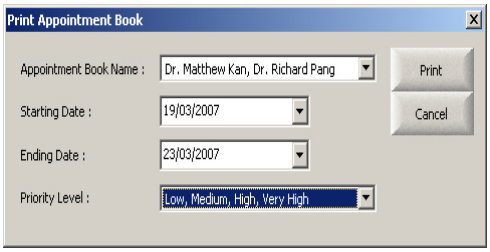
Step 6: Once all the information are checked to be correct, you can click the "Import" button to proceed with the import process. Upon successful import, you will see the below message box.



5.7 Print Appointment List

MoCo allows user to perform print appointment list on standard A4 paper.

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

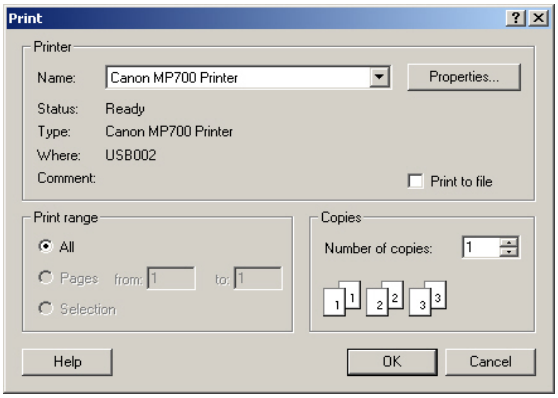


Step 1: Select the appointment book name which you wish to print.

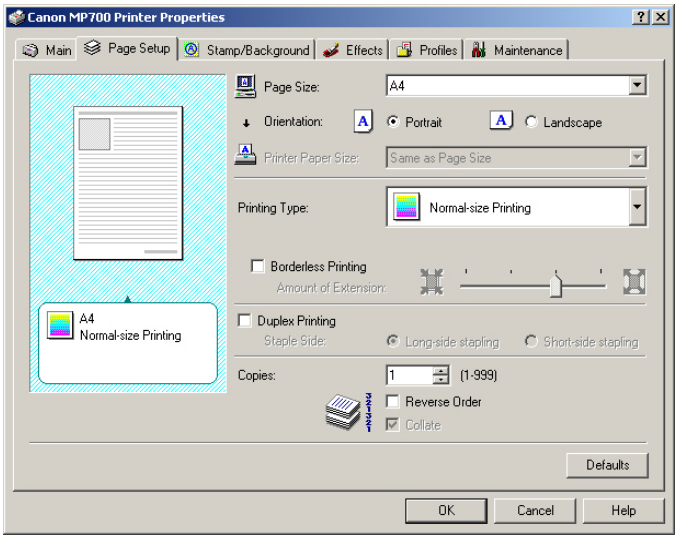
Step 2: Select the starting/ending dates of appointments to print.

Step 3: Select the priority level of appointments to be printed.

Step 4: Click **Print**. A Print dialog box as shown below will appear.



Step 5: Select the appropriate printer name. Click “Properties” button to set the paper size.



Step 6: A dialog box as shown above will appear. Note that for different printer, a different kind of dialog will appear.

Step 7: Go to Page Setup and set the Page Size to “A4”.

Step 8: Click “OK”. You will return to the previous Print dialog box.

Step 9: Click “OK” to proceed with the printing.