# MoCo™ SMS Suite

Quick Guide for SMS Appointment Reminder System

Chapter 1: Introduction	3
1.1 Purpose	3
1.2 Target Audience	3
Chapter 2: Client Database Management	4
2.1 Import existing customer database	4
2.1.1 Prepare Import File (csv/txt) from existing database	4
2.1.2 Prepare Import File (MS Excel) from existing database	5
2.1.3 Configure type of Import file	6
2.1.4 Import csv/txt file into MoCo	7
Chapter 3: Create Message Templates	9
3.1 Message Tags	9
Chapter 4: Regular customer callback1	1
4.1 Update customer's information1	1
4.2 Perform customer recall	1
Chapter 5: Appointment Management1	4
5.1 Setting up Auto Appt Confirmation1	4
5.2 Configure Appointment Book settings1	4
5.3 Adding, Deleting and Updating Appointment1	5
5.3.1 Add new Appointment1	5
5.3.2 Delete Appointment1	7
5.3.3 Updating Appointment1	7
5.3.4 Changing Appointment Date1	7
5.4 Check Response1	7
5.4.1 Do manual Appt Confirmation at Transaction Manager1	8
5.5 View Appointment History	9
5.6 Import Appointment List	9
5.7 Print Appointment List	0

# **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.

	A		В	C	D	E	F	G	Н		J	K	L	M	N	0	P	Q	F
1	Dennis Chang	+6591																	
2	Foo Chee Yong	+6598	Save As																_
3	Daniel Chua	+6598	Save in:	🗎 MoCo Te	estBed		v (3)	- 📬 🖸	X 📬 📰	• Tools •									_
4	Eric Boo	+6581																	_
5	Chang Cheow Joo	+6581	2	Export Ad	idr book1.	ISV.													_
6	Hark Loong	+6598		Export Ad	ldr book.c	W.													_
7	Kahshin	+6593	Documents	Import Ad	idr book 1	CSV													_
8	Mun Kiat	+6597		Import Ad	ldr book 2	CSV													_
9	Wilson Chia	+6598		DA Jroque 🕅	IOP DOOK 3	CSV													_
10				Import Ad	IOF DOOK 4	CSV													_
11			Desktop	Tunnant Ad	lur uuuk 5 lak kaali 6	USV													_
12				Timport Ad	lar DOUK D Ide book 7	cev.													_
13				- anipore wa		637													_
14			My Documents																_
10			riy bocanono																
17																			=
10																			_
10			My Computer																_
20			0															-	_
20				Tile annua						_									_
21			My Network	rile name:	Import	Addr book1.cs	v		۷		<u>5</u> ave								
23			Places	Save as type:	CSV (C	ımma delimiter	l) (*.csv)		v		ancel								_
24		L		-	Unicode	Text (*.txt)			^		//								
25					Microso	t Excel 5.0/9	Workbook	(*.xls)											
26					CSV (Cr	t Excel 97- Ex	cel 2003 8/5	.0/95 Workbo	ok (*.xis) =										
27					Microso	t Excel 4.0 W	orksheet (*.	xls)	_										
28					Microso	t Excel 3.0 W	orksheet (*.	xls)	*										
29																			
30																			
31																			_
32																			
33																			
OA H ·	Export Ad	dr bool	1/								<								>

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.

Micro	soft Excel
Ģ	Export Addr book1.csv may 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 Heip.
	Yes No Help

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.

he Text Wizard has this is correct, cho	determined that your data is Delimited. ase Next, or choose the data type that best describes your data.	
Original data type	ose next, or choose the data type that best describes your data.	
Choose the file typ	e that best describes your data:	
Delimited	- Characters such as commas or tabs separate each field.	
○ Fixed <u>w</u> idth	<ul> <li>Fields are aligned in columns with spaces between each field.</li> <li>Idata:</li> </ul>	
• Fixed width Preview of selected	- Fields are aligned in columns with spaces between each field.	
Fixed width     Fixed width     Fixed mobile     Selected     Raw Mobile     Selected     S	- Fields are aligned in columns with spaces between each field. I data:	

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

Convert Text to Columns Wizard - Step 2	of 3	? 🗙
This screen lets you set the delimiters your data or how your text is affected in the preview below. Delimiters I Tab Semicolon Gomma Space Other: Data greview	ontains. You can see	
Raw Mobile 91112222 +6592221111 92223333 93334444		
Cancel	Sack Next > Finish	

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

Fhis screen lets you select each column and set the Data Format.	Column data for O General	mat	
'General' converts numeric values to numbers, date	⊙ <u>T</u> ext		
values to dates, and all remaining values to text.	O Date: MI	DY 🔽	
	🔘 Do not impo	ort column (skip)	
Advanced			
<u></u>	B	1	
	D <u>e</u> stination:	\$B\$1	
Jata greview	D <u>e</u> stination:	\$B\$1	
Data greview	D <u>e</u> stination:	\$B\$1	
Data préview	D <u>e</u> stination:	\$B\$1	
Data preview Text Raw Mobile	Destination:	\$B\$1	••••••••••••••••••••••••••••••••••••••
Text Raw Mobile 91112222	Destination:	\$8\$1	
Text Raw Mobile 91112222 +6592221111	Destination:	\$B\$1	
Text Raw Mobile 91112222 +6592221111 9222333	D <u>e</u> stination:	\$B\$1	
Data preview           Text           Raw Mobile           91112222           +6592221111           92223333           93334444	Destination:	\$8\$1	

#### 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.

Configuration Setting	gs	N 100 100 100 100 100 100 100 100 100 10
Configuration Settin Basic General Address Book Scheduler Appointment Book Device GSM Terminal	Address Book  Area Code to be auto-inserted:  Default SMS Subscription  By default, subscribe to SMS  By default, do not subscribe to S  Default Import Address Book Delimiter  Format for importing address book :  SpreadSheet Name :  Duplication Check  Enable Duplication Check when a	H65 MS MS Excel
	OK	Cancel Apply

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.

Open					? 🛛
Look in: My Recent Documents Desktop My Documents	MaCo TestBe	ed Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.cov Solit.Solit.cov Solit.cov Solit.cov Solit.Solit.cov Solit.cov Solit.cov Solit.Solit.cov Solit.cov Solit.cov Solit.Solit.cov Solit.Solit.Solit.cov Solit.Solit.cov Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.Solit.S	•	← <b>€ ↔ ()</b>	
My Network Places	File name: Files of type:	Export Addr book1.csv Comma Separated Values F Open as read-only	iles (".c:	• sv] •	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	Contact
Dennis Chang	+6591181254	57012345A	
Foo Chee Yong	+6596988152	S7123436B	Friends
Daniel Chua	+6598465863	57234567C	Friends
Eric Boo	+6581983951	57345678D	
Chang Cheow Joo	+6581239211	S7456789E	
Hark Loong	+6598268922	S7567890F	
Kahshin	+6593625065	57678912G	
Mun Kiat	+6597429045	S7789123H	
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	S7012345A	
+6596988152	57123436B	Friends;Class A
+6598465863	S7234567C	Friends;
+6581983951	S7345678D	Friends;Class B
+6581239211	S7456789E	
+6598268922	S7567890F	
+6593625065	S7678912G	
+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			×
Pased Contacts Total number: 9 Chang Chew Joo Daniel Chue Daniel Chue Daniel Chue Daniel Chue Daniel Chue Daniel Chue Daniel Chue Daniel Chue Daniel Chue Total Chue Hak Loong Kahtini Kahtini Wilson Chia	Faled Contacts	Feason of Failure	
	1	Save Result Procee	d 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: 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.

Template Name :	Patient Recall Template
Template Content :	Hi < <recipient name="">&gt;, it's time now! You are due for your routine checkup at ABC clinic. Please call us at 6353535 for an appointment.</recipient>
	8
	[135 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 :	Tomolete Information					
Test Template	r emplate information				_	4
	Template Name :	Test Template			Add New Template	
	Template Content :	Hi < <recipient na<br="">&lt;<appt date="">&gt;, &lt; Name&gt;&gt;" From</appt></recipient>	me>>, please remember to co (Appl Time>>, To confirm, rep ABC Dental.	ome for your appointment at ply SMS "Confirm < <appt< td=""><td>Delete Template</td><td></td></appt<>	Delete Template	
			Undo Cut Conv		Update Template	
			Paste			2
			Delete		Clear	ł
		[167 characters]	Insert Message Tag 🔸	Recipient's Name Recipient's Number Originator's Name	Envires	
				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: 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.

Gender		<u> </u>
Date Of Birth		
Felephone (Home)		
Felephone (Office)		
Address		
Email		
Race		
5MS Subscription		<u> </u>
Remarks 1	Language, IT, Business	
Remarks 2		
Remarks 3		
Members of		

Step 3: Click on Step 3

#### 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 <sup>MM</sup> 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.

Becipients		S	end
Advanced		Ca	ncel
	· ]		
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 :			
		Undo	
		Cut	
		Сору	<u></u>
		Paste	
Message Type :	Normal Text	Delete	
	2	Insert Template 🔹 🕨	Test Template
		Append Template 🔸	2
		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. You can select your criteria and perform a search to retrieve the relevant customers' information.

Advanced Search	Criteria —					
Field Name		Search Type		Parameter	<u>^</u>	Search
Remarks 1	•	Contains	-	Language		Antipa constants
	-		-			Clear Criteria
	-		-			denter recently and
	-		-			
	-		-			
	-		-			
	•		-			
	-		-			
	-		-		~	

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

Mobile	NRIC	User ID	Gender	
+65911	\$7012345A			Select All
+65969	S7123436B			
+65984	S7234567C			Selected
+65819	S7345678D			Contacts
+65812	S7456789E			Antonio
+65982	S7567890F			
+65936	S7678912G			Clear Entries
+65974	S7789123H			All the second s
+65968	S7891234I			
	Mobile +65911 +65969 +65984 +65819 +65812 +65982 +65936 +65974 +65968	Mobie NHIC 465911 S7012345A 465993 S7012345A 465993 S7234567C 465819 S7345678D 465812 S7456780E 465936 S7567830F 465936 S76783126 465936 S7789123H	Mobile         NRIC         User ID           465911.         S7012345A         465968.           465989.         S71234967         465819.           465913.         S73234570         465819.           465914.         S7234570         465914.           465915.         S73456780         465924.           465924.         S7578907         465936.           465935.         S767891234         465968.           465968.         S78912341         465968.	Mobile         NRIC         User ID         Gender           +65911.         \$701245A         +65984.         \$71234587           +65984.         \$7234567         +65813.         \$73456780           +65912.         \$73456780         +65984.         +65984.           +659854.         \$774567806         +659854.         \$76783126           +659854.         \$777931234         +65968         \$78912341

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.

Recipients	Dennis Chang;Foo Chee Yong;Daniel Chua;Eric Boo;Chang Cheow		Send
Advanced	Joo;Hark Loong;Kahshin;Mun Kiat;Wilson Lhia;		Cancel
Message : [135 characters]	Hi < <recipient name="">&gt;, it's time now! You are due for your routine checkup at ABC clinic. Please call us at 6353535 for an appointment.</recipient>		
		~	

# **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:

les Information
ule Name · Appt Confirmation
Londkion-
Sender
Sender ##ALL##
44
Advanced
Message Pattern
Begins with Confirm
Contains
A - Marcine
Action
Action Type : Action Parameters
Auto Reply to Sender
Forward to selected Hecipients     Type or Message:
Automatic Shutdown
Export to Text Document
SMS Subscription
Register Contact
Contirm/Cancel Appointment
Dinformation Betrieval

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 Particle icon on the toolbar or select Configuration Settings from the Tools menu.

<b>Configuration Setting</b>	35	×
Basic General Address Book Scheduler <u>Appointment Book</u> Device GSM Terminal Enterprise Server Settings	Appointment Book      Default settings      Appt Start Time : 09:00 s SMS Preferred Time : 10:30 s      Appt End Time : 22:00 s      Default SMS Reminder : 1 s Days before appointment      Default Priority Level : Medium v      Send subsequent SMS reminders      Send subsequent reminders irregardless of response      Send subsequent reminders to confirmed recipients only      Do not send reminders to confirmed/cancelled recipients      Appointment name starts with :      A      MultiAppt Book Configuration      MultiAppt Book Configuration	
	OK Cancel Apply	

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
- o Preferred time to SMS
- Date for SMS Reminder
- o 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

ist of Appt Books: Default	Appointment Book Info	
Dr. Matthew Kan Dr. Richard Pang	Appt Book Name :	Add
	Appt Book Description :	Delete
		Update
		Clear Entrie:
	1	

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.

Dr. Richard Pang Appointment Book for March 21, 2007	×
Lat of Appointment information  Appointment Name: A1  Priority: Medium  Subject: Denni Drang Appointment  Sub Time: 0200  Remarks: 0	Add New Appointment
End Time: 10.00	Appointment
Int SMS Reminder     Pretered Time to SMS: 10.30 - 1 + 0 her      Message Content:     Hit cofficacient Name>>, you have an     Message Type:     [156 cheated:     Hit cofficacient Name>>, you have an     Message Type:     [156 cheated:     ]	Dear Entres Response
And SMS Reminder      Pretered Time to SMS:     10.30	Day View
Ad SMS Remider      Preferred Time to SMS: 10.30 Datase Detroe appointment      Message Content:      Message Content:      Provide Text      Normal Text	

- 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).
- $1^{st}/2^{nd}/3^{rd}$  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 second 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".

Change Appointment Date			
Appointment Book Name :	Dr. Richard Pang	•	
New Appointment Date :	10/30/2007 👻		
Start Time :	09:00		
End Time :	22:00		
ОК	Cancel		

# 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

From	Message	Received	Status	Route To	Terr
Dennis Chang	L received your message	March 20, 2007 11:16:31	OK	ALL	525
	Reply to Sender				
	Forward message				
	Delete Records				
	Confirm/Cancel Appointment				

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 Adialog box will appear for you to view appointment history.

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

View Appointme	nt History					
Select Name :	Jennis Chang			•		Search
Search in SMS	Recipient pintment's Subj	ect				Cancel
Date	Start Time	End Time	Appt Book	Appt Name	Subject	
21 March 2007	09.00	10.00		~	Dennis Crie	
						2

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

## **5.6 Import Appointment List**

Step 1: Click the Appointment Ist file. MoCo expects a csv (comma-separated-values) file for importing appointment.

Open							? 🔀
Look in:	Co TestBed	1	•	<del>(</del>	ď	-	
My Recent Documents Desktop My Documents	By Export Addr boo By Export Addr boo By Import Addr boo	kt.csv kt.csv kt.csv kt.csv kt.csv kt.csv kt.csv kt.csv kt.csv kt.csv					
Mu Network	File name:	 Comma Separated Values File	as l° ca	vì	•	[	Open Cancel
Places	1	Copen as read-only		.,		-	

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.

serieral Appointment an ormation	Recipient Name	<ul> <li>Appt Book Name</li> </ul>	💌 Recipient Mobile No.	Appt Start Time	
Appointment Date : 3/21/2007	Jorgen Winum	Dr. Richard Pang	96280000	"08:30"	
	Swee Pin Er	Dr. Richard Pang	98520000	"09:00"	
Default Priority : Medium 💌	Mark Kum Choon Woo	Dr. Richard Pang	96461111	"09:30"	
washing (Minutos) . 20	Amy, Geok Huay Chia	Dr. Richard Pang	91772222	"10:00"	
Juration (Minutes) : 30	Philip Chew Poo Tan	Dr. Richard Pang	97543333	"11:30"	
veferred SMS Time :	Teng Phuan Chua	Dr. Richard Pang	97114444	"12:00"	
	Kian Heng Chua	Dr. Richard Pang	90675555	"13:00"	
10:30 1 Days v before Appt.	Grace Mei- En Lim	Dr. Richard Pang	92786666	"14:00"	
	I Gek Quek	Dr. Richard Pang	98577777	"14:30"	
Message Type : Normal Text	Mong Siang Ong	Dr. Richard Pang	91212324	"15:00"	
Aessage Content : [154 characters]	Choo Keow Biao	Dr. Richard Pang	98757777	"16:00"	
interesting and the second second	Choo Keow Boon	Dr. Richard Pang	98758888	"17:00"	
HI < <recipient name="">&gt;, you have an appointment with us at &lt;<appt date="">&gt;,</appt></recipient>	<	Ш		>	J
< <appt time="">&gt;. To confirm, reply SMS with "Confirm &lt;<appt name="">&gt;" ABC Dental</appt></appt>	Import Process Logger				
	CliTerro		C	Import	

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.

Print Appointment Book		
Appointment Book Name :	Dr. Matthew Kan, Dr. Richard Pang	Print
Starting Date :	19/03/2007	Cancel
Ending Date :	23/03/2007	
Priority Level :	Low, Medium, High, Very High	

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.

Print		?
Printer		
Name:	Canon MP700 Printer	Properties
Status: Type:	Ready Canon MP700 Printer	
Where: Comment:	USB002	Print to file
Print range		Copies
• All		Number of copies: 1 🛨
C Pages C Select	from: 1 to: 1	11 22 33
Help		OK Cancel

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

🐝 Canon MP700 Printer Properties			? X
🟐 Main 😂 Page Setup 🧕 Star	mp/Background 🛛 🎺 Effec	ts 📴 Profiles 🛛 👪 Maintenance 🗎	
	🖳 Page Size:	A4	- I
	↓ Orientation: ▲	Portrait     A     C Landscape	
	Printer Paper Size:	Same as Page Size	1
	Printing Type:	Normal-size Printing	-
	Borderless Printing Amount of Extension	··· 💥 🛄 📩 🚺	3
A4 Normal-size Printing	Duplex Printing Staple Side:	© Long-side stapling C Short-side stapling	
	Copies:	1 🔆 (1-999)	-
		Reverse Order     Gollate	
		Defaults	
		OK Cancel Help	

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.