grapevine

OUTLOOK SMS

USER GUIDELINE

THIS DOCUMENT IS AIMED AT:

Grapevine Affiliate administrators and users who have been provisioned to use Outlook SMS.

FEEDBACK:

Was this document useful? What can we do to make this user guide more useful and informative? Please email info@vine.co.za with your comments and feedback.

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Call us on +27 21 702 3333, or email support@vine.co.za.

**Note, you must be registered with Grapevine to log a support query.*

Version: 2.1

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Abbreviations

CSV	Comma Separated Values
SMS	Short Message Service
URL	Universal Resource Locator

Definitions

Affiliate	A Company that is registered with Grapevine and has been provisioned to use one or more of its products or services.
Campaign	In Outlook SMS, a campaign is a collection of messages sent out by an Affiliate to a number of mobile phones.
Portal	A website or web page that the owner positions as an entrance to other sites or pages on the internet.
SMSC	An SMS Centre (SMSC) is responsible for handling the SMS operations of a wireless network.When an SMS message is sent from a mobile phone, it will reach an SMS centre first. The SMS centre then forwards the SMS message towards the destination. An SMS message may need to pass through more than one network entity (e.g. SMSC and SMS gateway) before reaching the destination. The main duty of an SMSC is to route SMS messages and regulate the process. If the recipient is unavailable (for example, when the mobile phone is switched off), the SMSC will store the SMS message. It will forward the SMS message when the recipient is available.
Web application	Any program which runs in a web browser and relies on that web browser to render the application.

1 Introduction

The purpose of this document is to assist Grapevine Affiliate users and administrators who have been provisioned to use Outlook SMS. This document covers how to send SMS Messages using Outlook, receive SMS replies and view online reports and statistics about the messages you have sent.

2 General Information

2.1 What is Outlook SMS?

Outlook SMS allows you to compile an email and send it to multiple mobile phone users as multiple SMSs. You will need to download the outlook SMS plugin, which will prompt you every step of the way when setting up and composing your email.

Outlook SMS appears as a button on Microsoft Outlook's menu bar, which enables instant messaging. When clicking on the button, the Outlook SMS screen appears and you can simply compose your message and insert or select your recipients.

2.2 How does it work?

2.2.1 Sending an Email to SMS Message

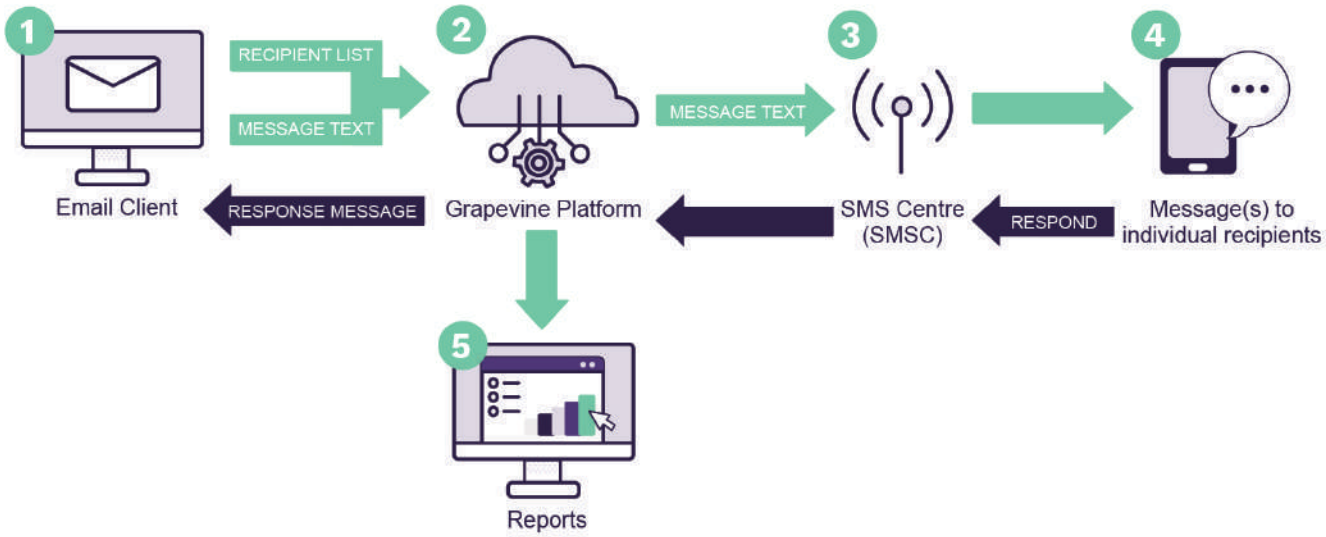


Figure 1 – Sending an Email to SMS Message

1. An Affiliate opens their email client and opens the Outlook SMS dialogue box.
2. The message(s) is sent to the Grapevine Interactive platform.
3. The message(s) is submitted to a mobile network server.
4. The message(s) is routed to individual recipients.
5. Affiliate users can view detailed reports and statistics via the web application.
4. Recipients can respond to the SMS which they received.
3. The message(s) is then submitted back to the mobile network server.
2. The message(s) is sent to the Grapevine Interactive platform.
1. The message(s) is routed back to the email client.

2.2.2 Sending an SMS to Email Message

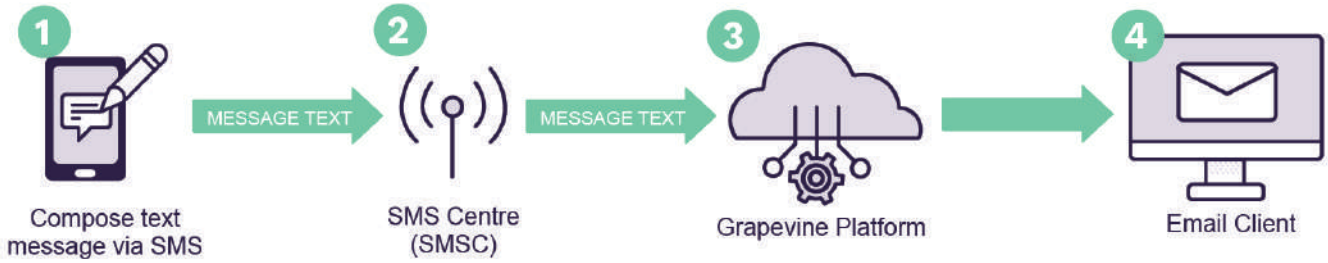


Figure 2 – Sending an SMS to Email Message

1. An Affiliate composes a new SMS and sends the message to a recipient.
2. The message(s) is submitted to a mobile network server.
3. The message(s) is sent to the Grapevine Interactive platform.
4. The message(s) is routed to the email address which was specified in the SMS

2.3 Features

- ✓ Address book integration which allows you to send SMS messages to your Outlook contacts.
- ✓ Sent messages are stored in Outlook's sent folder and replies are sent to your inbox.
- ✓ SMS enables Outlook appointment and task alerts.
- ✓ Integrates with Microsoft Excel for personalised messaging.
- ✓ Supported by all South African Networks
- ✓ Supports all versions of Outlook
- ✓ Easy to use
- ✓ Replies to the SMSs are routed to your email inbox.
- ✓ Generate reports and view your messages via a web-based user interface.

2.4 What do you need in order to get started?

Once you have been provisioned by Grapevine Interactive to use the Outlook SMS email interface, you will receive an email which contains the following information:

- ✓ The **Outlook SMS Application** link (SMSInstaller.msi)
- ✓ Your Affiliate Code
- ✓ The **Login URL** to access the Outlook SMS reports
- ✓ Your Username and Password
- ✓ Your Authentication Code

Note: Please email support@vine.co.za if you have forgotten your username or password.

2.5 User profiles and permissions

SMS Broadcast has the following functions and permissions for specific user profiles:

PERMISSION	SEND BROADCASTS	OWN REPORTS	ALL USER REPORTS	MESSAGE QUERIES
Affiliate Administrator	Yes	Yes	Yes	Yes
Affiliate User	Yes	Yes	No	No

Table 1 – User profiles and permissions

2.6 Adding Users

In order to add a new user, please contact your company's technical contact so that they can provision a new affiliate user on the provisioning system. Alternatively, your company's technical contact may contact Grapevine to add the new user, by sending an email to: support@vine.co.za.

2.7 Delivery Receipts, Replies and Concatenation

All affiliates will receive delivery reports and replies to the email address used when creating the SMS campaign.

If you are sending a campaign to a large number of recipients it is recommended that you use an alternative email address specifically for this purpose as your Inbox may get full very quickly. You can contact Grapevine to disable the email delivery receipts and/or email reply option.

Affiliate messages are automatically truncated but should 160 characters not be sufficient, contact Grapevine to activate concatenation, where the maximum number of characters will be increased to 700.

3 Installing Outlook SMS

Before you can begin to send messages, you will need to install the Outlook SMS plugin. You will receive a copy of the link via email once you have registered with Grapevine as an affiliate.

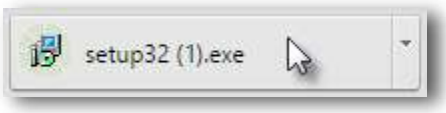
Step 1: Close MS Outlook

IMPORTANT: Before you close Outlook, make sure that you check which version you are running. This can be done by doing the following:

- **MS Outlook 2010:** Click **File**, thereafter click **Help** and on the right hand side you will see which version of Outlook you are running.
- **MS Outlook 2013:** Click **File**, thereafter click **Office Account** and then click **About Outlook** to establish which version of Outlook you are running.

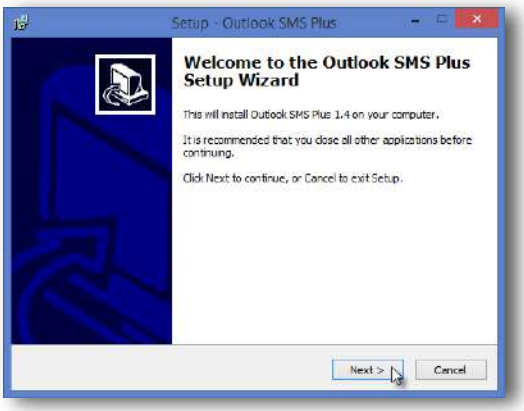
Step 2: Click the **link** sent to you via email when you registered with Grapevine

Step 3: Click the applicable **installation option** as per the Version of MS Windows installed on your computer.

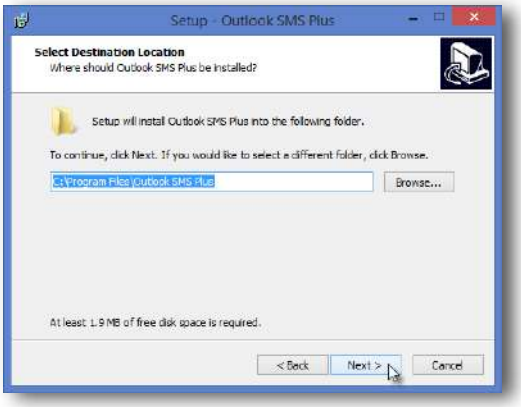


Step 4: Once you have downloaded the plugin, click on it to **start the installation** process.

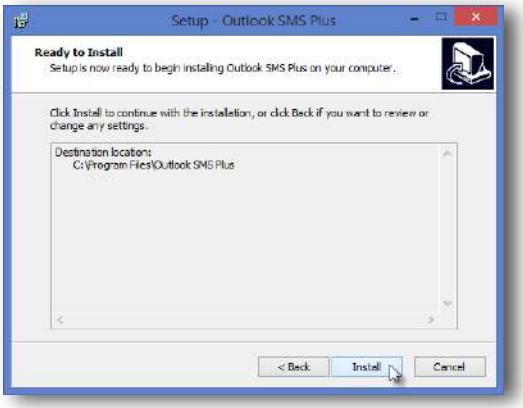
Step 5: The **Setup Wizard** will open, click **Next**.



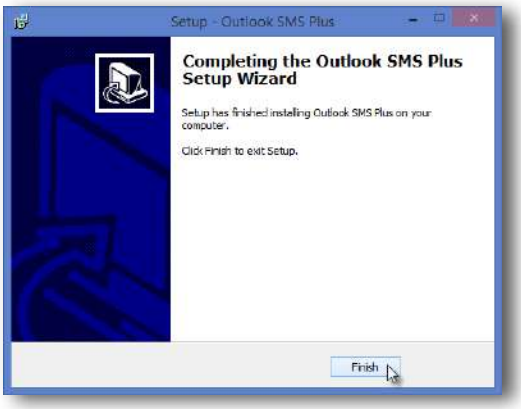
Step 6: Specify where the file should be saved, click **Next.**



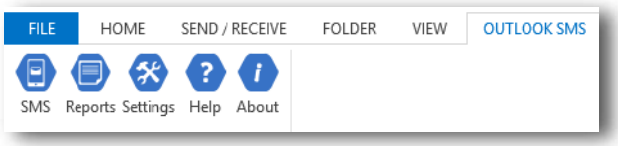
Step 7: Click **Install**



Step 8: Click **Finish**



Step 9: Open MS Outlook and you will see the **Outlook SMS toolbar**



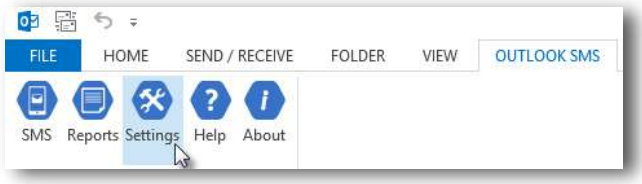
The Outlook SMS Toolbar will display the following options:

1. **SMS** – This opens the Outlook SMS Dialogue box where you will compose your message.
2. **Reports** – When you click Reports, you will be directed to the Outlook SMS portal.
3. **Settings** – This is where you configure the settings for your message.
4. **Help** – Get Outlook SMS Help
5. **About** – Identify the version of Outlook SMS which you are running.

4 Sending messages using Outlook SMS

4.1 Configuring your Settings

Step 1: Click **Settings** to set up your email defaults, including SMS format, Reminder Alerts, Signature and default country codes.



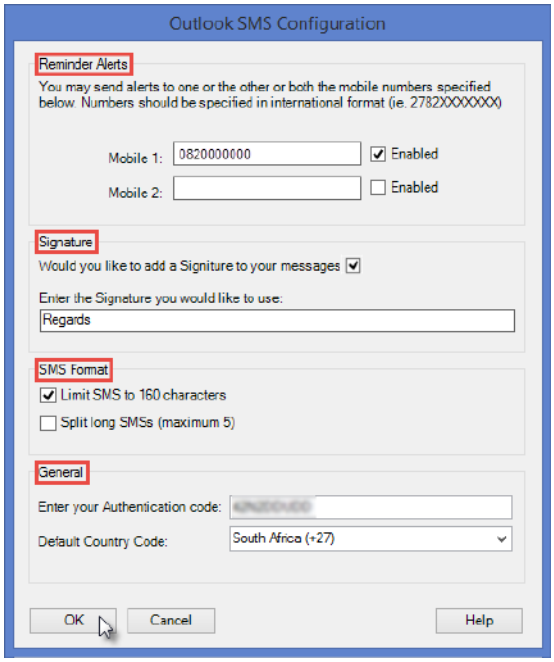
Step 2: Capture your Outlook SMS Configuration settings.

Reminder Alerts: *Alerts can be sent to one or both of the mobile numbers which you capture. You need to click the Enable check box to activate reminders to the corresponding mobile number.*

Signature: *Click the check box to enable a signature and capture the signature which you would like in the text box provided.*

SMS Format: *You can limit your message to one SMS (160 Characters) or it can be split over 5 SMSs (700 Characters).*

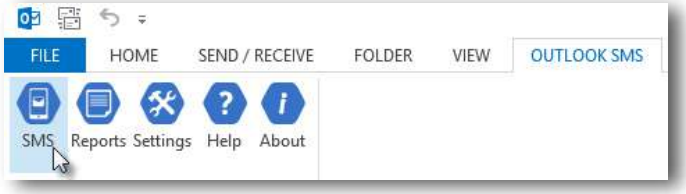
General: *Enter your Authentication code as well as the Country code, which will prefix your recipient numbers.*



Step 4: Click **OK**

4.2 Sending a Normal Outlook SMS Message

Step 1: Once you have configured your Outlook SMS settings, as per section 6.1, click **SMS** to open the Outlook send SMS dialogue box.



Step 2: In the **To...** field, type the **mobile number(s)** to which you would like to send the message to OR **select your contacts** from you Outlook address book by clicking Check Contacts (only contacts with mobile numbers will display).

IMPORTANT: The maximum number of recipients you can add is 30.

NOTE:

- You can enter multiple cell numbers, separated by commas.
- When you click outside the To… field, you will notice that the cell number changes to an email address.

Step 3: If you would like to add a subject to your message then you need to type it in the **Subject** field and click Add Subject to SMS (This will contribute to your character count).

Step 4: Type the message you would like to send in the text field provided.

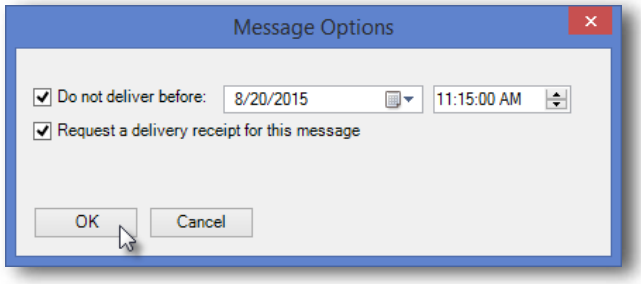
NOTE: As you type, the amount of characters you have used will display on the bottom left-hand side (the maximum number of characters depends on what you selected in your settings).

Step 5: Click **Message Options** if you would like the message to **delivered at a certain date and time** or if you would like a **delivery receipt** and make sure that you select the relevant check boxes

Step 6: Click **Send,** alternatively click **Save** to save your message to **Drafts**

IMPORTANT: Your message will be in your Sent Items once you have sent it.

Step 7: Click **OK**

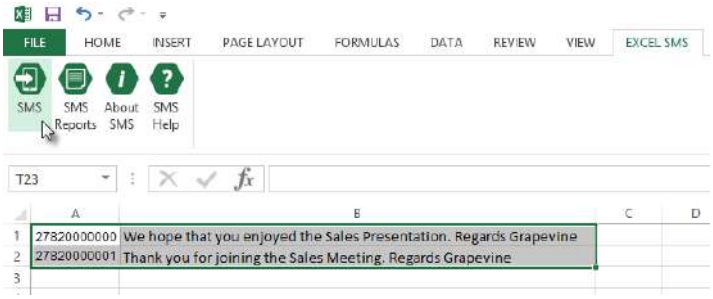


4.3 Sending a Message from Microsoft Excel

Outlook SMS integrates directly with Microsoft Excel; therefore, you can send messages from Excel using Outlook SMS.

Step 1: Compile an **Excel file** which contains the **mobile numbers** and **messages** which you would like to send SMSs to.

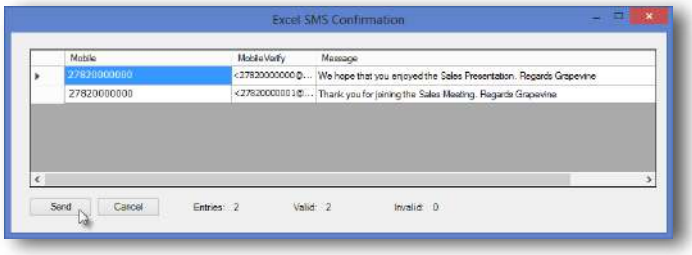
NOTE: The mobile number and the message should be in separate columns but in the same row.



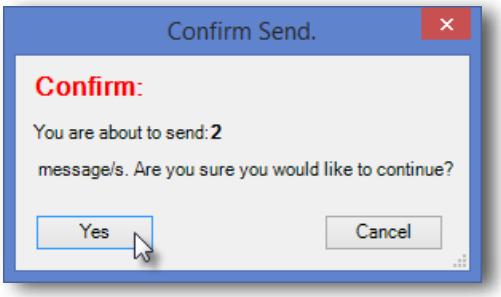
Step 2: **Select** column A (with the cell number(s)) and B (with the message text).

Step 3: In the **Excel SMS** tab, click SMS and the message verification dialogue box will display.

Step 4: Confirm that all entries are correct and valid, click **Send**.



Step 5: Click **Yes** to send your messages.



5 Accessing the Web Portal

Step 1: Open the **Login URL** provided in the provisioning email which you would have received from Grapevine Interactive OR click **Reports** in the **Outlook SMS** tab OR Click **SMS Reports** in the **Excel SMS** tab.

Step 2: Enter your **Username** and **Password** and click **Login**.

Once you have successfully logged in you will be taken to the Outlook SMS **Home** page where you have two options available:

1. **Change your Details**
2. Access **Outlook SMS**

5.1 Changing your details

Step 1: On the **Home** page, click **Change your details**.

Step 2: Under **My Profile**, enter your personal details and click **Update** to save your changes.

NOTE: Should you wish to exit the page without saving, simply click the **Back** button on your browser.

6 Reports

6.1 Report types

Once you have accessed Outlook SMS there are two report options for an Affiliate User:

- ✓ Statistics Report
- ✓ Messages Report

An additional report is available for an Affiliate Administrator:

- ✓ Affiliate Message Query

REPORT CATEGORY	DESCRIPTION	COLUMNS
1. Statistics Report	Statistical details of the delivery status of messages sent in specific broadcasts. Use this report to identify all failed or expired messages so that you can resend them.	• **Search range** (Date and time period for which the report has been generated) • Channel Type • **Total created** (Total messages created) • **Total successful** (We received a delivery receipt form the network) • **Total Failed** (We received a failed receipt form the network, or the recipient has chosen to opt out) • **Total expired** (After the 24h validity period, the message has not been able to be delivered) • **Total unconfirmed** (No delivery receipt has been received yet) • **Total batches** (Total number of broadcasts created)
2. Messages Report	Details of the content of the broadcast messages you have sent to each recipient. Use this report to check whether the correct message was compiled to be sent to a recipient and whether the message was sent successfully.	• **Date** (Date and time that the campaign was created) • **Campaign Name** (This field will display your unique campaign number) • **Message ID** (This field will display a unique message number) • **Originator** (The person who sent the email or the username of the person who logged in) • **Recipient** (Mobile number that the message was sent to) • **Channel** (The channel which the message was sent to) • **Status** (The most recent status of the message) • **Message** (Content of the message sent)

		• **Replies** (Content of the reply received)
3. Affiliate Message Query	Details of the content of broadcasts sent to or from a specified email address or cell number. Use this report to monitor broadcasts sent to or from a specific affiliate or cell number.	• **Date** (Date and time that the campaign was created) • **Campaign Name** (This field will display your unique campaign number) • **Message ID** (This field will display a unique message number) • **Originator** (The person who sent the email or the username of the person who logged in) • **Recipient** (Mobile number that the message was sent to) • **Channel** (The channel which the message was sent to) • **Status** (The most recent status of the message) • **Message** (content of the message sent) • **Replies** (Number of replies received from the recipient)

Table 2 – Comparative reports table

6.1.1 Statistics Report

Use this report to identify how many customers you've reached successfully in a specific time period, using a specific channel type.

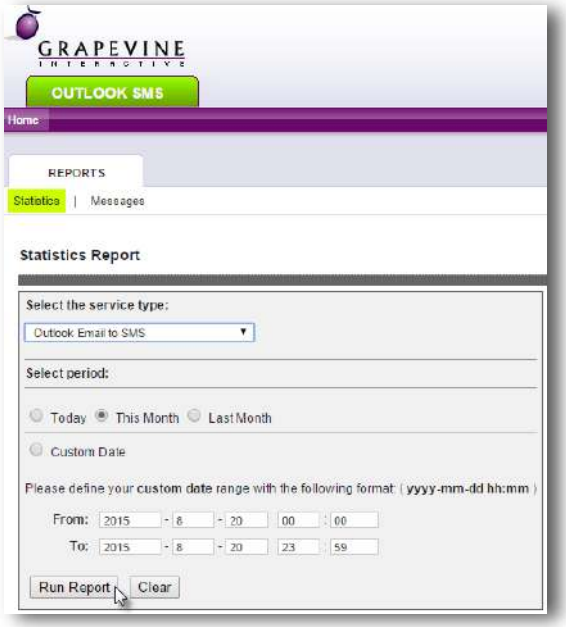
Step 1: Click **Outlook SMS** on the Outlook SMS **Home Page**.

Step 2: Click **Statistics**

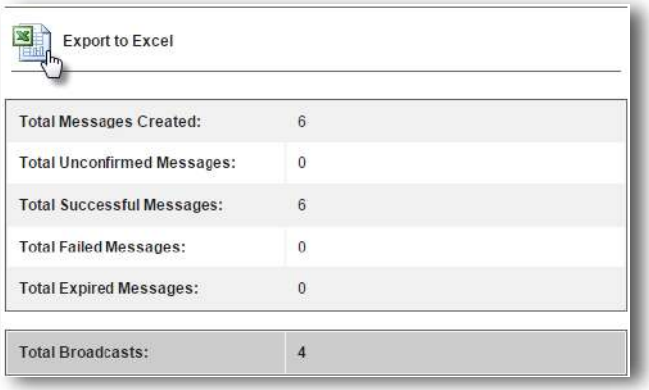
Step 3: Select the *Outlook Email to SMS* **service type**

Step 4: Select the **period** over which you want the report to run (Today, This Month, Last Month OR Custom Date)

Step 5: Click **Run Report** and the search results will display at the bottom of the page.



Step 6: To export your results click the **Excel Icon** which will be displayed once you have run the report.



6.1.2 Messages Report

Use this report to view the content of messages as well as any replies which might have been received.

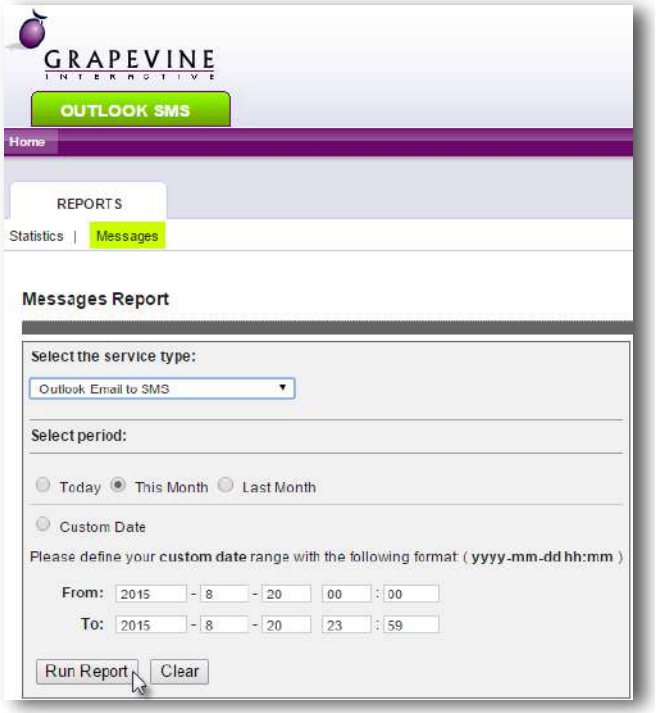
Step 1: Click **Outlook SMS** on the Outlook SMS **Home Page**.

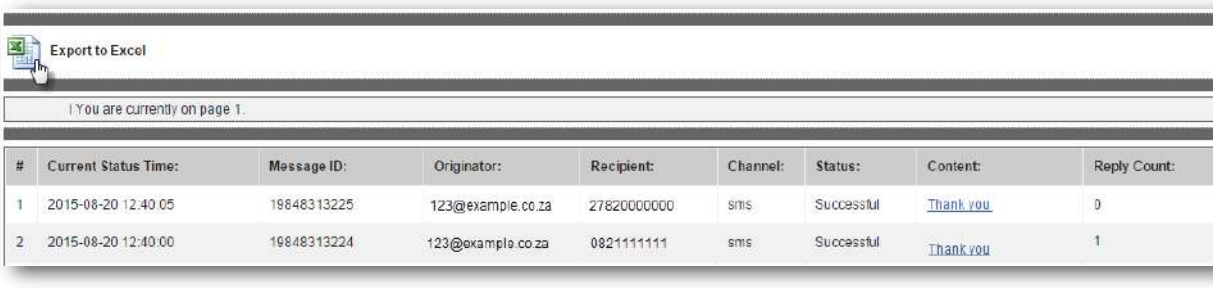
Step 2: Click **Messages**

Step 3: Select the *Outlook Email to SMS* **service type**

Step 4: Select the **period** over which you want the report to run (Today, This Month, Last Month OR Custom Date)

Step 5: Click **Run Report** and the search results will display at the bottom of the page.





Step 6: To export your results click the **Excel Icon** which will be displayed once you have run the report.

6.1.3 Affiliate Message Query (available to Affiliate Administrators only)

Use this report to view messages sent to or from a specific cell number or email address.

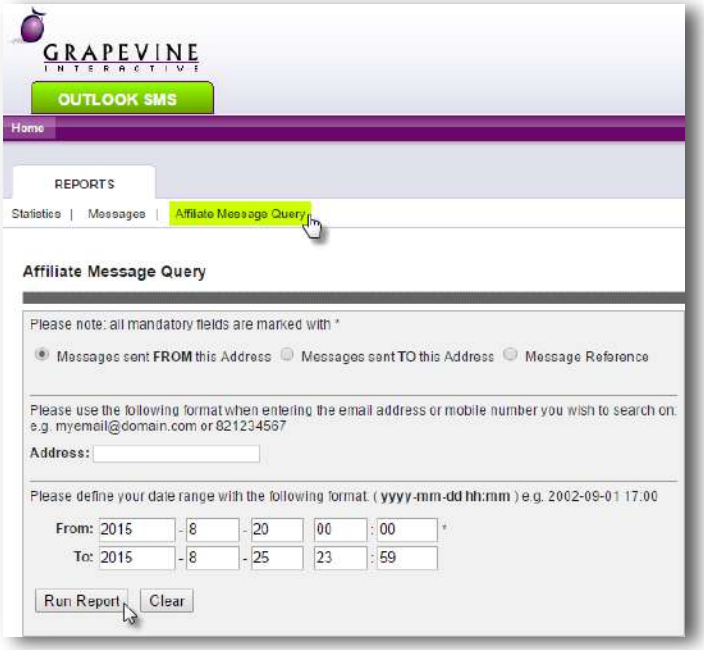
Step 1: When in the reporting section, make sure that you click **Affiliate Message Query**.

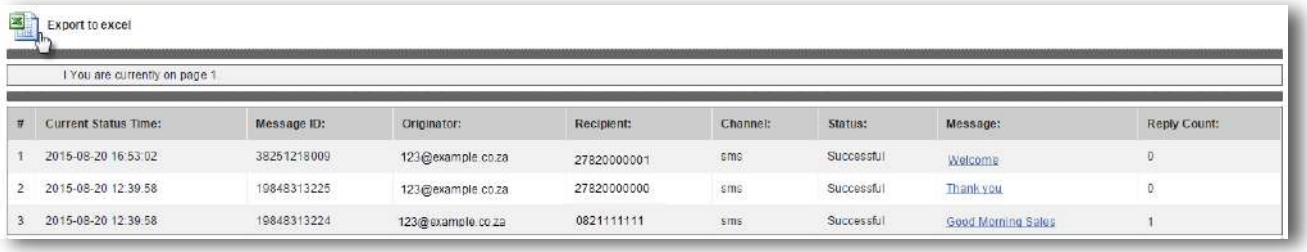
Step 2: Enter your **search criteria**

Select if you would like messages **FROM** or **TO** the specified address.

Select the **period** over which you want the report to run (Today, This Month, Last Month OR Custom Date)

Step 3: Click **Run Report** and the search results will display at the bottom of the page.





#	Current Status Time:	Message ID:	Originator:	Recipient:	Channel:	Status:	Message:	Reply Count:
1	2015-08-20 16:53:02	38251218009	123@example.co.za	27820000001	sms	Successful	Welcome	0
2	2015-08-20 12:39:58	19848313225	123@example.co.za	27820000000	sms	Successful	Thank you	0
3	2015-08-20 12:39:58	19848313224	123@example.co.za	0821111111	sms	Successful	Good Morning Sales	1

Step 4: To export your results click the **Excel Icon** which will be displayed once you have run the report.

7 FAQ

7.1 Which versions of Microsoft Outlook are supported by the Outlook SMS Plugin?

All versions from Outlook 2000 SP-1 onwards, including Outlook 2007 Beta 2 (from Outlook SMS Build 82).

NOTE: Outlook 2000 ver. 9.0.0.2711 has bugs that make it incompatible with plug-ins and users of this specific version must update to Outlook 2000 SP-1 by installing the Service Pack 1 available from the Microsoft website at no charge.

7.2 Which versions of Microsoft Windows are supported?

Windows 98

Windows Me

Windows 2000

Windows XP

Windows 2003 Server

Windows Vista (32/64 Bit)

Windows 7 (32/64 Bit)

Windows 8 (32/64 Bit)

7.3 Outlook SMS doesn't work with my Mailing List - none of the contacts have cell numbers, why?

There are two ways of creating Mailing Lists. One is by clicking "Select Members" to add contacts from the address book - this is the correct way. But it is possible to click "Add New" - this is the wrong way as it simply adds email addresses (and no other contact information) to the Mailing List.

For Outlook SMS to work with Mailing Lists, you MUST click "Select Members" to add contacts from the address book.

7.4 My SMS plugin doesn't appear in Excel, why?

Please follow the following steps:

1. Open Excel
2. Click on Options
3. Click on "Add-Ins"
4. On Manage drop down menu, select "Disabled Items" and then click "Go" button
5. If Outlook SMS is listed, click on it and click "Enable"
6. Close Excel.
7. Open Excel and the toolbar should have regenerated.

7.5 I sent a message to a friend and he replied, but I never received the reply - what happened?

Replies are sent to you by email and the sender address is set to <cellnumber>@domain e.g. 27821234567@os.vine.co.za.

Because the sender address looks abnormal, some spam software suppress the message. If you are not receiving your messages, check with your network administrator that such messages will be allowed by your network anti-spam software.

7.6 What do I need in order to send SMS Messages?

You have to have an account, which is linked to your email address. When you apply for access to Outlook SMS you'll be given the following information:

- Authentication code
- Username and Password

7.7 My Outlook SMS toolbar has disappeared! How do I get it back?

Outlook sometimes disables plug-ins and their toolbars in the case of a program conflict, for example. To restore your toolbar, perform the following checks:

1. Open Outlook.
2. Click on View, Toolbars. You should see Outlook SMS listed. If not, proceed to step 4
3. Click on Customize. Click on Outlook SMS and click Delete to delete the toolbar. Proceed to step 7.
4. Click on Help, About.
5. Click on Disabled Items.
6. If Outlook SMS is listed, click on it and click Enable.
7. Close Outlook. Open Outlook. The toolbar should have regenerated.

See also ***8.8 My Outlook SMS Toolbar SOMETIMES disappears! Why?***

7.8 My Outlook SMS Toolbar SOMETIMES disappears! Why?

A known issue is caused by third party applications that start MS Outlook in order to perform (for example) address book synchronization. An example of this is the Microsoft Active Synch product that works with many Smart Phone and PDA devices. If such a device is attached to the computer at start-up, Active Synch may start Outlook automatically - and when this happens, Outlook may not start up plug-ins such as Outlook SMS correctly. To fix the problem, make sure that such devices are not attached to the computer at start up.

7.9 The Installer doesn't work on my computer

Note that the installation program (SMSInstaller.msi) requires the Microsoft® Windows® Installer to be present on your computer. If it is not, or if the installation on your computer is out of date, then you may have to update it.

To see more information, and to obtain the update, browse to the following URL:

https://support.microsoft.com/en-us

7.10 Why do I have to type email addresses for my contacts when all I want to do is send SMS messages?

Outlook SMS has to connect to Microsoft Outlook in order to list the contacts. MS Outlook cannot list contacts without email addresses (unless you are viewing the contacts folder directly).

Unfortunately that's just the way that MS Outlook was designed, and there is no other efficient method to list the contacts.

7.11 When I try to send a message, I get a reply with the subject, "Outlook SMS Notification" that says that my message failed.

This usually means that either a) the authentication code that you configured in the options dialog is incorrect, or b) you've been provisioned with a different email address to the one that you are using in your Microsoft Outlook.

To fix the problem:

1. Check that the authentication code is correct in the options dialog.
2. Check that the email address quoted in the notification email is the same as the one in your Outlook (i.e. the email address set when you send someone an email). If this is incorrect, then you need to contact customer care and ask them to change the email address in your account.

7.12 How can I tell whether I have the latest version of Outlook SMS?

1. Click on the About button.
2. Click on the Check for Latest Version link.

Your browser will open and a page will display that tells you if your Outlook SMS is up to date. If it is not, a link is displayed where you can download the latest version.

7.13 Outlook SMS seems to cause my Outlook 2000 to exhibit strange behavior

Some users have reported that their Outlook behaves strangely after Outlook SMS has been installed. Such behavior includes:

- The body of some forwarded emails is lost i.e. when forwarded, the body of the email is blank.
- Outlook persists in asking whether an email just opened should be saved (although no changes have been made).

Outlook 2000, specifically version 9.0.0.2711 is known to have bugs that cause problems when plug-ins are installed. The solution is to apply the service packs available for Office 2000 from the Microsoft web site http://www.microsoft.com/downloads

7.14 When I check the status of the Automatic download it says, "Failed to download File". What happened?

Company networks are often configured to disallow the download of files from the Internet. If so, you will see an error message that looks like the text below:

> 2004/03/05 07:01:42 AM: Failed to download File
> http://www.gvi.bms.vine.co.za:8080/outlooksmsversioncheck/Downloads.ini
>
> Context: The error occurred while processing the remote file.
>
> Error Message: The server, while acting as a gateway or proxy, received an invalid response from the upstream server it accessed in attempting to fulfill the request.

You may need to ask your network administrator to allow the files to be downloaded.

7.15 I sent a message from Outlook SMS and it never arrived on the recipient's mobile phone. What happened?

1. Click on Reports, log in using your username and password. Search for the message.
2. If you find the message, check its status. If the status is "failed", it means that the mobile network was unable to deliver the message, perhaps because the phone was switched off; out of range; its inbox is full or the mobile number was invalid.
3. If you don't find the message, then check that a copy of the message is in your Outlook "Sent Items" folder. If it is, then you should call customer care. If it is not, try sending the message again. If you still experience problems, call customer care.

7.16 How do I un-install Outlook SMS?

1. Close Outlook.
2. Click on Start, Settings, Control Panel.
3. Click on Add/Remove Programs.
4. Scroll down until you see Outlook SMS.
5. Click on the Change/Remove button.

7.17 The SMS button doesn't appear in my Outlook Toolbar. What do I do?

1. Open Outlook.
2. Click on Tools, Options.
3. Click on the "Other" tab
4. Click on the "Advanced Options" button.
5. Click on the "COM Add-ins" button.
6. If there is a check box named "Grapevine SMS Plugin", check (i.e. click on) it.
7. If there is not, click on Add and navigate to the installation directory (usually c:\Program Files\Grapevine\Outlook SMS) and select smsplugin.dll.
8. Click OK, OK, OK and the button should appear.

7.18 When I click the To… button, I get an error message, "Either there is no default mail client set or the current mail client cannot fulfill the messaging request"

You must make Microsoft Outlook the default email client for your computer.

Perform the following steps:

1. Open Microsoft Internet Explorer.
2. Click on Tools.
3. Click on Internet Options.
4. Click on the Programs tab.
5. Choose Microsoft Outlook as the E-mail program.
6. Click OK.