



SMS Master for SAP Business One

Easily send SMS and Email from within SBO

Installation and Usage Guide

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1. General

SMS Master is a SAP Business One (SBO) add-on, designed to enable easy SMS messaging and E-mail messaging.

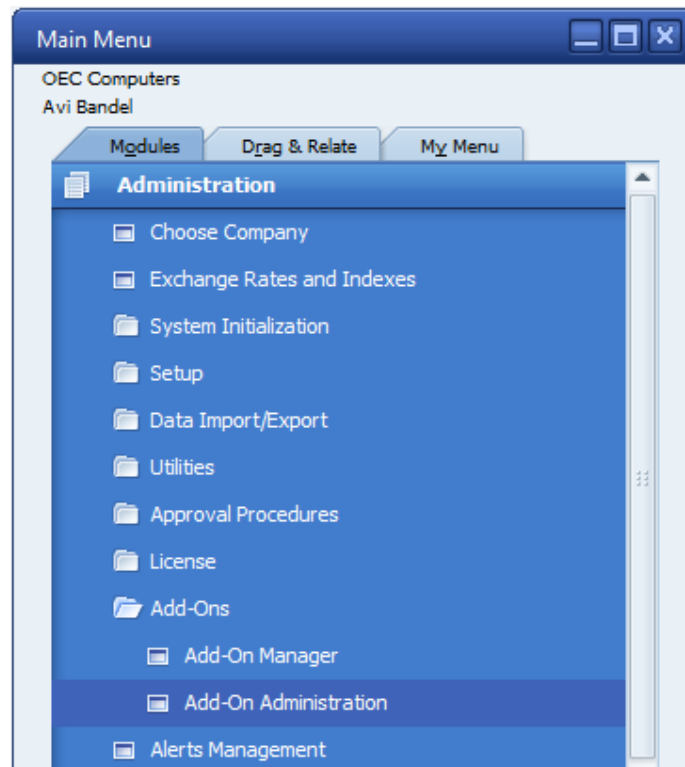
2. How do I download SMS Master add-on?

Go to our website, at www.on-click.co.il/products/SMSMaster/ and download the application from there. There is a different version for every SAP Business One version (2005, 2007 and 8.8)

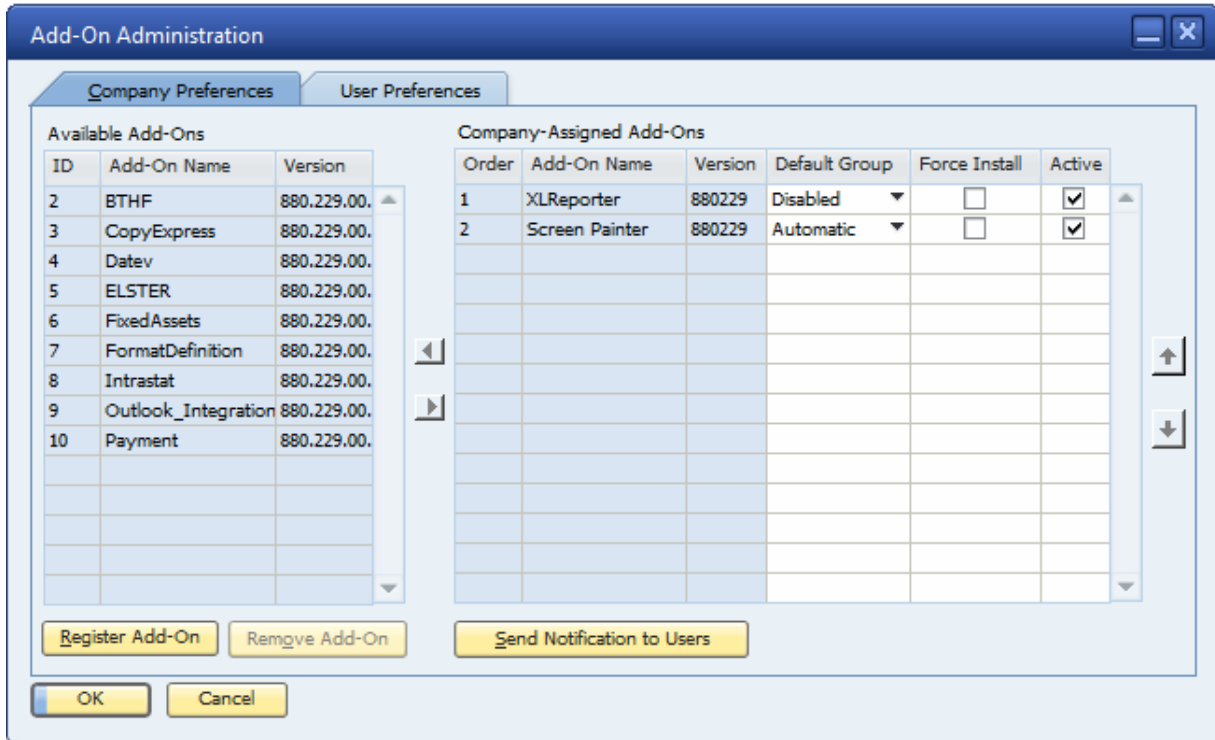
3. How do I install SMS Master?

After downloading the ZIP file from the site, extract both files from it. There should be one .ard file and one .exe file. Remember where you put those two files, and make sure the two files are in the same directory.

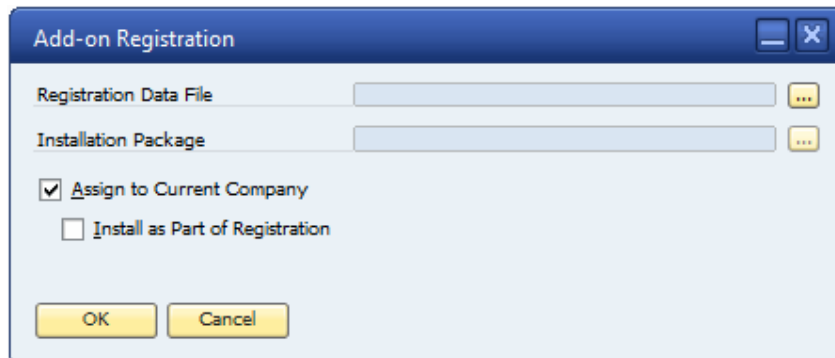
Start SAP Business One, go to Administration→Add-Ons→Add-On Administration



The add-on administration form will open:

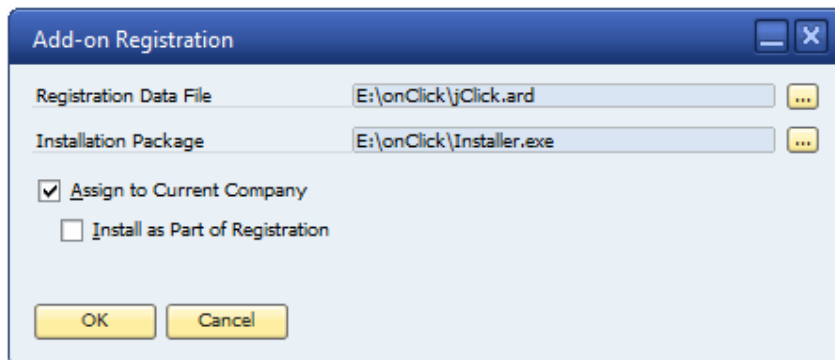


Press the "Register Add-On" button. A new form will open:



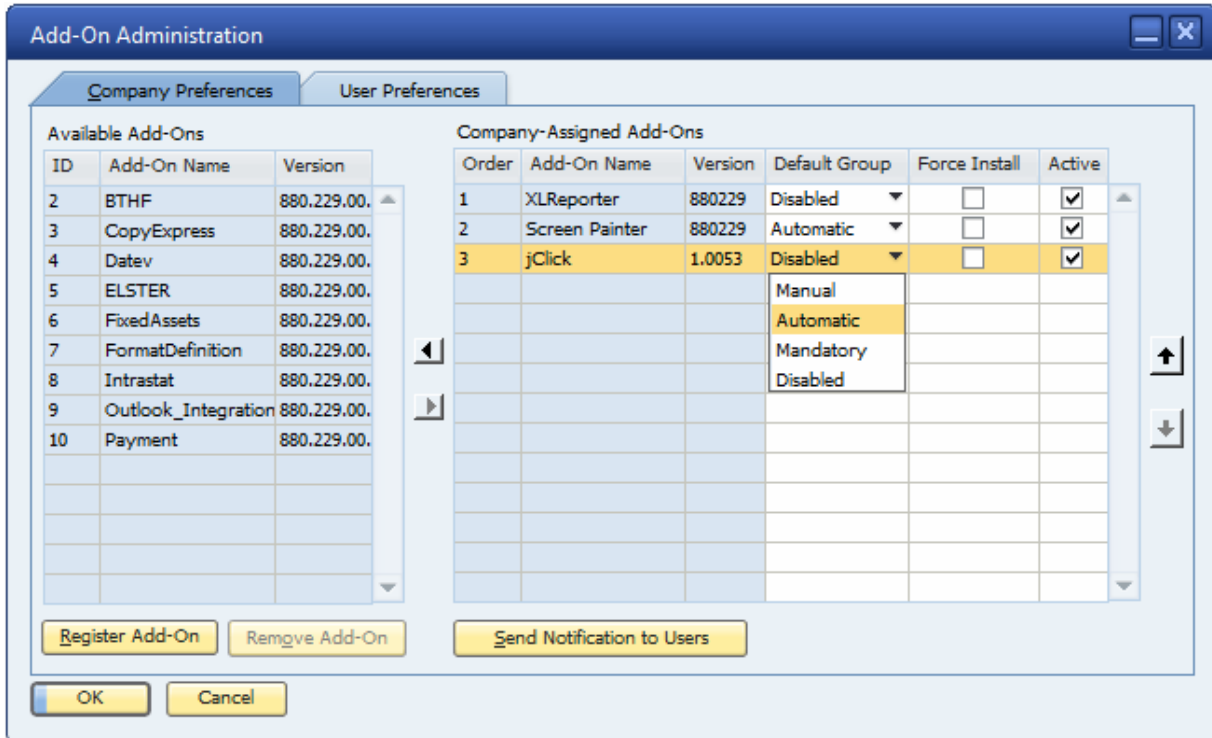
Press the "..." button on the right of the "Registration Data File" field. Now you need to select the .ard file you have extracted earlier from the ZIP file.

After selecting the .ard file, it's full path and name will show in the "Registration Data File" field.



Press "OK" to register the new add-on.

Now, you will see the add-on is added to the Company-Assigned Add-Ons list:

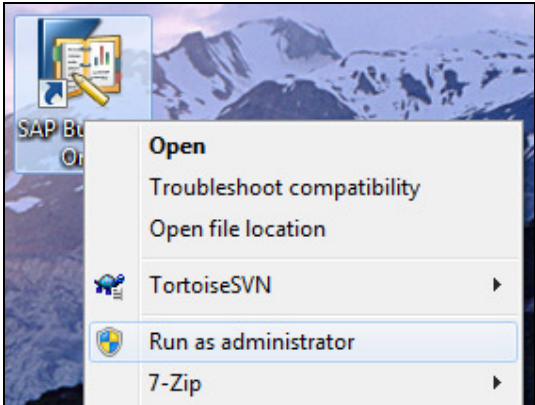


Make sure it is tagged "Active" (or else it would not work at all). Also, you would probably want the add-on to load automatically when a user logs into SAP, so make sure the "Default Group" is "Automatic" for the add-on. You can change the way the add-on works for each user separately, in the "User Preferences" tab - you can specify that the add-on will be loaded manually for some users, if you'd like that (the user would need to manually go to Administration→Add-Ons→Add-On Manager and Start the add-on).

Now, the add-on needs to install itself into the company. Log off and then log back on to the company (you can just quit SBO and re-run it if it's simpler for you).

The add-on will install itself. After the installation, you will need to (once again...) quit SBO and re-run it. This is because the add-on adds some user-defined objects to the system, and SBO loads them when only when it is starting the application.

Windows Server 2008 and Windows 7 users - note that for the add-on to be installed you will need to "Run as Administrator". Just right-click the SBO icon and click "Run as Administrator" menu option, and then answer "Yes" in the confirmation box. This is needed only when the add-on installs itself on a computer, not for every run.



4. Integrating the Add-on in your SBO Company

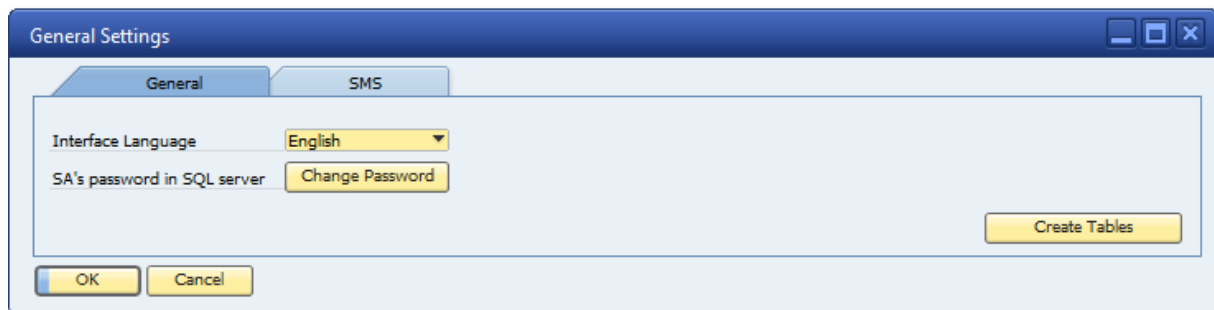
For the SMS Master to work on your SBO company, you will need to perform the following integration procedures.

4.1 **Get SMS Credit**

Contact onClick, at sales@on-click.co.il or +972-73-726-7286 and get your first 10 free SMS messages. You can also purchase bundles of SMS messages at this same contact.

4.2 **Settings**

Go to Administration→onClick→Addon Settings



In the General tab, select your preferred interface language, and set the password of the "sa" login name, of the SQL server.

You will probably won't ever need to use the "Create Tables" button, it's just there for trouble-shooting.

In the SMS tab there are many settings you can set, some of which are mandatory for the operation of the SMS Master add-on.

General Settings

General | **SMS**

SMS sever login credentials

Username: test
 Password: [masked]

Settings

Country code: 972
 SMS origin: OEC Computers
 SMS origin is user's cellular number
 Use Unicode (for non-English letters)
 Close SMS Form upon successful delivery
 Show delivery report
 When more than 10 message were sent
 Show confirmation dialog before sending messages
 When more than 3 message were sent

Automatic message text upon opening SMS form

#	Form	Automatic Message Text
1	133	Hello [[OCRD.CardName]], a new invoice was issued
2		
3		

Automatic messages upon creation/update of documents

#	Form	Send on Creation	Send on Update	Message to Send
1	139	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Your order totaling [[ORDR.DocTotal]] was processed.
2		<input type="checkbox"/>	<input type="checkbox"/>	

When writing messages, you can refer to data on any form, by using the code [[Table.Alias]]

Update Cancel

Send Emails

Enable E-Mail sending

SMTP Server: mail.google.com
 User name: someone
 Password: ****
 Email origin address: me@google.com
 Email origin is the user's email

Add SMS sends to BP's activities

Disabled
 Enabled
 Enabled, and user can disable
 Disabled, and user can enable

Activity type to use: SMS Message

Now we will specify the mandatory and optional settings of the SMS Master add-on.

4.2.1 Mandatory Settings

Setting Name	Description
User name	The user name you've received from onClick, for logging in to the SMS server
Password	The password you've received from onClick, for logging in to the SMS server
Country Code	The country code you are using to send SMS messages to (e.g. if you send SMS messages in the United States, the country code is 1; for India use 91, etc)
SMS origin	This is the number (or alpha-numeric string) that the recipient will receive the SMS messages from. Usually, you'd want to set it to a phone number at your business, so users can reply to your message, or just use your business name to identify the message origin.
SMS origin is user's cellular number	If SMS Master is used for communication between your users and your business partner, it could be useful to check this box. Checking this box will use the current user's mobile phone number as the origin of the SMS message.
Use Unicode (for non-English letters)	You must check this box if you intend to send SMS messages with non-English letters, such as German, Spanish, Hebrew, Indian, etc. Note that SMS messages with Unicode can be only half as long as SMS message without Unicode.

4.2.2 Optional Settings

Setting Name	Description
Close SMS Form upon successful delivery	Check this box if you want the SMS message form to be closed once you successfully send an SMS.
Show delivery report	Checking this box will open a delivery report (in Excel - must be installed on the client computer) with details about the messages sent. You can specify that the report would show only when sending more than a specific number of messages.
Show confirmation dialog before sending messages	Checking this box will show a confirmation question before actually sending the messages. You can specify that the dialog would show only when sending more than a specific number of messages.
Enable E-Mail sending	If this box is checked, you can also send Emails using the SMS Master add-on. You will need to define SMTP server, username, password and origin of the email messages, for this feature to work.
Add SMS sends to BP's activities	Checking this box would add Business Partner activity for each SMS message sent, when you select a BP as a recipient. You will need to specify an activity type to be used.

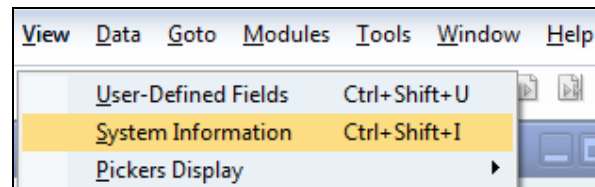
Automatic message text upon opening SMS form

For each form in SAP Business One, you can define an automatic text to be used when sending messages when this form is in focus. e.g. you can define that when sending messages when an AR invoice document is visible, clicking "Send Message" menu will use this text: "Hello [[OCRD.CardName]], a new invoice was issued". the text enclosed with [[and]] would be replaced with the data from the current open form.

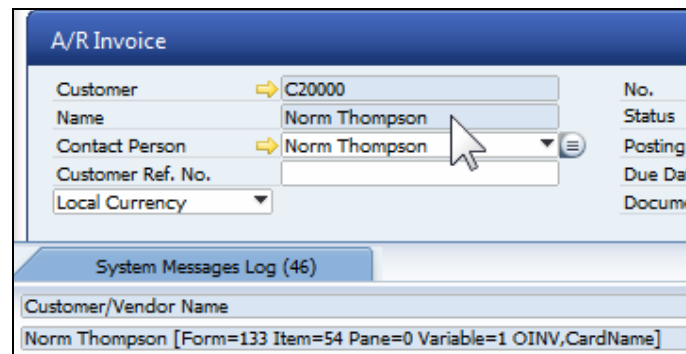
Automatic message text upon opening SMS form

#	Form	Automatic Message Text
1	133	Hello [[OCRD.CardName]], a new invoice was issued
2		
3		

Form codes (e.g. 133 for AR Invoice) can be found when pressing View→System Information



And then moving your mouse over text in the form you are viewing. The form code will appear at the bottom of the screen:



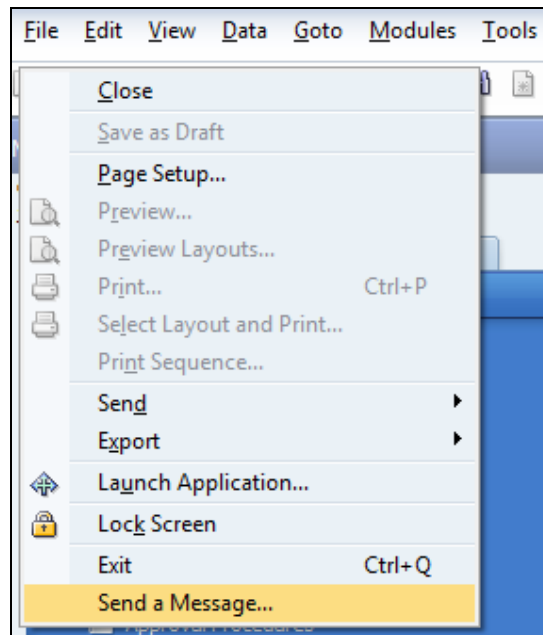
Automatic messages upon creation/update of documents

This setting is similar to the one above, except it will make SMS Master send messages automatically upon the creation or updating of a new document.

5. Using SMS Master

5.1 Sending Messages

Go to File→Send Message... to start sending messages.



The messaging form will open.

If you opened the message from while there was some other form (Business Partner form, Sales Order form, etc...) was open (and in focus, meaning its title was blue), the contact person's relevant phone number (and email, if it is enabled via the add-on settings form) is automatically filled into the form.

If you defined a default message for that form, in the add-on settings form, this message will appear.

Send SMS/Email Messages
⏏

Current SMS balance 19.88 EUR

SMS origin (number or English text) OECCompute

Add SMS delivery to BP's activities

Recipients to deliver to:

SMS	BP Code	BP Name	Foreign Name	Cellular Number
<input checked="" type="checkbox"/>	➔ C30000	Microchips		0545389865

Add recipient from Excel
Add recipients from BP

Message content

Hi Judy, the printers technician is on its way.
 Please make sure there's an adult on the site.

Total 94 characters in the message. 2 SMS messages needed to deliver this message. From Templates...

Last SMS messages you've sent

Date Sent	Time Sent	Phone Number	Card Code	Card Name	Contact Person	Message
03/02/2011	13:03	0545389865	C30000	Microchips	Judy Brown	Hi Judy, the printers technician is on
03/02/2011	12:56	0525112233	V60000	CTI Informática		Hello, Please confirm fax 102205 was
03/01/2011	20:52	0545389865	C42000	Mashina Corporation		hello, this is ש בדיקה

Send
Cancel

Click Send to send the messages.

5.1.1 Adding Multiple Recipients

Use the "From a File" and "By Properties" buttons to add many recipients at a time.

Business partner types to add to recipient list

- Customers
- Suppliers
- Leads

BPs with one of the following properties will be added:

Check	Code	Name
<input type="checkbox"/>	28	Business Partners Property 28
<input type="checkbox"/>	29	Business Partners Property 29
<input type="checkbox"/>	30	Business Partners Property 30
<input type="checkbox"/>	31	Business Partners Property 31
<input type="checkbox"/>	32	Business Partners Property 32
<input type="checkbox"/>	33	Business Partners Property 33
<input type="checkbox"/>	34	Business Partners Property 34
<input type="checkbox"/>	35	Business Partners Property 35
<input type="checkbox"/>	36	Business Partners Property 36
<input type="checkbox"/>	37	Business Partners Property 37
<input type="checkbox"/>	38	Business Partners Property 38
<input type="checkbox"/>	39	Business Partners Property 39
<input type="checkbox"/>	40	Business Partners Property 40
<input type="checkbox"/>	41	Business Partners Property 41
<input type="checkbox"/>	42	Business Partners Property 42
<input type="checkbox"/>	43	Business Partners Property 43
<input type="checkbox"/>	44	Business Partners Property 44
<input type="checkbox"/>	45	Business Partners Property 45

Add Recipients Cancel

Select the business partner type you want to add to the recipients list. Also, you can choose as many Business Partner properties as you want, to filter business partners of your choosing. Click "Add Recipients" to add matching recipients to the messaging recipients list.

